

June 2021

Synthesis Report

The use of research in the Bet Regret campaign

Written by Ipsos MORI on behalf of GambleAware

Foreword

Gambling harms are best understood as matters of health and wellbeing – as a public health issue demanding a ‘whole system’ public health response, across:

- Primary prevention - universal promotion of a safer environment
- Secondary prevention - selective intervention for those who may be ‘at risk’
- Tertiary prevention - direct support for those with gambling disorder or for those who may be directly affected

Recognition of gambling as a public health issue is relatively recent, and there is little experience globally of well-evidenced interventions contributing to the prevention of the harms that can be caused by gambling.

Whilst recognising that any campaign is only one part of the way a target group may be influenced to change their behaviours, the Bet Regret campaign has broken new ground in engaging ‘at risk’ groups, in this case frequent sports bettors. The 2-year long campaign has used a systematic approach following public health campaign principles.

A narrative report providing an overview of the context, development, implementation and impacts of the campaign is available separately¹.

During that period, we have sought to capture the lessons learnt. Research and monitoring have played a central role in the implementation of an evidence-based public health approach, and have contributed strongly to decision making in the Bet Regret campaign. At every stage – across strategy development, creative development and the measurement of impacts – we have relied on research and monitoring to guide decisions, with a cumulative research investment equivalent to almost 10% of our media spend.

In this context we commissioned Ipsos MORI to prepare this independent synthesis report with a specific focus on the role and value of research and evaluation in the implementation of the campaign, across all the many and varied pieces of research conducted. Our aim is to document and share the learning we have gained in running a public health campaign to reduce gambling related harm.

We, the Safer Gambling Board, would like to thank all involved in the broader research process for their contributions and commitment particularly as we needed to keep the campaign going during the COVID-19 pandemic : the team at GambleAware and communications agencies and consultants supporting them, and in particular the research agencies involved – Ipsos MORI, The Nursery, The Outsiders and YouGov.

Professor Sian M Griffiths – Chair, The Safer Gambling Board

¹ Safer Gambling Campaign Development: Avoiding Bet Regret; an overview of the campaign to date; December 2020).
<https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

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1 Executive Summary

1.1 Introduction and campaign overview

In February 2018, the Safer Gambling Board was established by GambleAware to oversee the delivery of a safer gambling campaign. The objectives of the subsequently titled 'Bet Regret' campaign were as follows:

- **Year One:** To shift attitudes and provoke conversation on the moderation of sports betting, through the avoidance of impulsive, risky behaviours such as chasing losses in the heat of the moment
- **Year Two:** To increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids

This report focuses on the use of research in the Bet Regret campaign. It examines how research and monitoring informed the development of the campaign, drawing together key findings from across nine strands of research which have helped to underpin an evidence-based public health approach. A broader background on the development, implementation and impact of the campaign can be found in the 'Avoiding Bet Regret' campaign narrative report.²

It should be noted that the key learnings and recommendations in this synthesis report represents the views of Ipsos MORI, and do not necessarily represent the views of all the authors who contributed to each research study.

1.2 Sources of evidence

Figure 1.1. below provides an overview of the research that was commissioned as part of the Bet Regret campaign:

Figure 1.1: Sources of evidence

Research strand	Purpose
YouGov segmentation, August - October 2018	A survey to capture the gambling attitudes, perceptions and behaviours of male bettors in the UK, and to then create audience segments for use in further developing the campaign strategy.
The Nursery: Safer gambling development research, September 2018	Qualitative research to better understand how bettors feel about gambling and about their gambling behaviours, and to explore ways to communicate with frequent bettors, to motivate them to self-reflect and ultimately moderate their gambling behaviour. This research helped inform the creative brief for the campaign.
Ipsos MORI Tracking Waves 1-8, Nov 2018 – Apr 2021	Eight waves of survey research to capture exposure to the campaign and monitor any changes in the gambling behaviours and attitudes of those within the target audience – both towards their own habits and gambling generally.
The Nursery: Creative development research November 2018	Qualitative research to explore three new creative routes produced by M&C Saatchi. Using focus groups meant research could explore bettors' spontaneous reactions to creative.

² <https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

The Nursery: Creative Review and Activation Idea Testing February 2019	Three focus groups to sense check the creative assets of the winning idea from the previous Nursery Research before they were launched, and to explore new brand activation ideas with bettors.
The Nursery: Bet Regret Creative Review July 2019	Six focus groups across the UK to explore new creative ideas for the campaign, and to explore the extent of recall and takeout of 'Think Twice' from the creative.
Ipsos MORI: Behavioural change research , Nov. 2019	A trial of four nudges to test their usability and impact on bettors' behaviour. The trial provided in situ insights on how bettors used the advice. The research recommended which behaviour nudge would be most impactful for bettors in helping them reduce risky bets.
The Outsiders: Creative development research for stage 2 of the campaign , Feb-Aug 2020	Focus groups and depth interviews to explore creative routes before they were fully developed, and to sense check assets before their launch to identify final amends that needed to be made.
Ipsos MORI: Tap out message refinement research , Dec 2020	Virtual in-depth interviews were conducted to explore concepts for different creative routes designed to enhance the 'tap out' element of the campaign. Recommendations were considered when finalising the second iteration of the Tap Out campaign creatives.
Secondary sources	More broadly a number of secondary sources of data and insight on gambling participation and risk of harms were drawn on at the very beginning of the campaign development process ³ . These were provided as background to the initial communications agency briefing, and also helped inform research design and targeting in a general sense. They are not a focus for this synthesis as all key decisions relating to the campaign were primarily driven and validated by the specifically commissioned research detailed above. For more background on this the reader is directed to the narrative report ⁴

1.3 Strategy Development

This section explores the role research played in the development of the strategy of the Bet Regret campaign. It draws on research conducted in both years of the campaign, by YouGov, The Nursery Research and Planning, and Ipsos MORI, All research studies were commissioned by the Safer Gambling Board. The findings were used to inform the development of the campaign by GambleAware and campaign partners M&C Saatchi and Goodstuff .

³ e.g. The Gambling Commission's latest annual report (February 2018): 'Gambling participation in 2017: behaviour, awareness and attitudes' (plus technical annex)

Gambling behaviour in Great Britain in 2015: Evidence from England, Scotland and Wales; prepared for the Gambling Commission by NatCen; August 2017

Future Thinking: Responsible Gambling Campaign Development; November 2016

Revealing Reality: Responsible Gambling: Collaborative Innovation Identifying good practice and inspiring change; 2017 (plus annex documents)

Expert View - Responsible gambling public education campaign for Great Britain: A brief scoping review; prepared for GambleAware by Alexander Blaszczyński PhD & Sally Gainsbury PhD, Gambling Treatment and Research Clinic Science Faculty, Brain and Mind Centre, School of Psychology, The University of Sydney, January 2018

Expert View on Influencing Gambling Behaviour from a Behavioural Science Perspective; Communications Science Group; Richard Chataway and Gonzalo Lopez Castellaro (with advice from Dr Mark Griffiths, Professor of Behavioural Addiction, Nottingham Trent University); March 2018

Report on Senet Group Campaign Evaluation; October 2017

⁴ Safer Gambling Campaign Development: Avoiding Bet Regret; an overview of the campaign to date; December 2020).
<https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

Understanding the audience

The YouGov segmentation used cluster analysis to identify key characteristics of the most risky bettors. The study identified three key segments of interest for the campaign accounting for 22% of male bettors aged 16-45. Bettors in segments A, B and C were classified as high risk,⁵ and were frequent bettors who often/sometimes displayed risky behaviours. Details of these three segments were used to inform media strategy and target groups for any future behaviour change objectives.

Readiness to change gambling habits was higher amongst high risk bettors than low risk bettors. The YouGov segmentation found that bettors in high risk segments (A, B and C) were more likely to think they should cut down their gambling, and more likely to already be taking steps to try and change their betting habits. This confirmed the value of Safer Betting Campaign to support those interested in moderating their behaviour.

High risk bettors are more likely to gamble to escape boredom, whilst low risk bettors are the most likely to gamble for fun. Over half (64%) of high-risk bettors believed they gambled to escape boredom or fill their time, compared to a quarter (25%) of low risk bettors. Over three quarters (76%) of low risk bettors felt fun motivated them to gamble compared to 62% of high-risk bettors. These findings helped inform the execution of the campaign – for example, being ‘bored’ was one of the three risky situations depicted in the first wave of the campaign.

Betting behaviours vary greatly between individuals and common ground is elusive. Qualitative research found that bettors felt that establishing what was typical behaviour of bettors was too difficult to do as each person has their own normality on betting habits and routines. The YouGov segmentation also indicated significant variances amongst bettors in the amount of time spent gambling in a day and what time of day they usually gamble. For example, one fifth (20%) of both segments A and B spend two hours or more a day gambling compared to only a small minority of segments D (4%), E (3%) and F (1%).

The emotional journey of a bet provides more commonalities amongst bettors than behaviours. Participants in the Nursery Development research focus groups were able to work through the difference stages of placing a bet and agree on what emotions they experienced at each stage; confidence before placing the bet moved to excitement having placed it, and then depending on the outcomes ended in relief or disappointment and frustration. As a result of these insights, the creative development brief for the campaign asked agencies to focus on universal emotions experienced by everyone in their betting journey: defining how an impulsive, ill-considered bet feels.

Insights for creative development

There are important perceived differences between betting and gambling. Bettors in the Nursery Development research focus groups felt that gambling has a ‘bad press’ and is seen as more serious and addictive than betting. In comparison, betting was associated with skill in the minds of the male bettors who took part in a group.

The idea of ‘a bet you kick yourself for’ resonated strongly with bettors. Losing the bets that the bettor knows should not have been placed in the first place made bettors feel a sense of regret. This sense of loss was very relatable across all focus groups. This insight led to a brief for creative development in which they key thought to express in the creative routes was ‘watch out for the bets that you kick yourself for’.

⁵ As part of the segmentation model, ‘risk’ was in part determined by responses to the Problem Gambling Severity Index (PGSI). More information on PGSI scoring can be found here - <https://www.gamblingcommission.gov.uk/news-action-and-statistics/Statistics-and-research/Problem-gambling-screens.aspx>

There is value in providing bettors with mental aids to help them moderate their betting behaviour. Ipsos MORI Behavioural Change Research tested four behavioural interventions with frequent bettors. Research respondents were asked to rate their interest in the four tips, then trial use of their preferred tip over a period of around 12 days (to include two weekends). The trial demonstrated some success for each of the interventions.

'Closing the app' was the most appealing behavioural intervention. This 'nudge' was expected to have the biggest impact on bettors' behaviour, and to be the easiest to incorporate into a betting routine. In comparison, not everyone believed they would actually use 'Say the bet' or 'Take a look' in practice, or that it would have an impact if they did use it. As a result of this research, the communications brief for year 2 of the campaign was to popularise the Close the App tip and make it memorable.

1.4 Creative development

This chapter reviews the role that creative development research played in the Bet Regret campaign. It draws on research conducted by The Nursery Research and Planning, The Outsiders and Ipsos MORI.

Refining creative routes

Research was used to test different creative ideas against one another to inform decisions about which to take forward as part of the campaign. Focus groups with frequent male bettors in London, Cardiff and Glasgow conducted as part of the Nursery creative development research November 2018 revealed important differences in the bettors' reactions to the ads. The relatability of the ideas varied significantly by region, as did the likelihood of each ad causing bettors to bet more safely. Recommendations for how to develop *Don't bet on it* were taken in to account when the idea was turned into the films used for TV and online advertising in stage 1 of the campaign.

Research was used to sense check assets before they were fully launched. In focus groups conducted by the Nursery in the Creative review research February 2019, frequent bettors and partners of frequent bettors were shown two TV ads that were both soon due for launch. Research identified last minute adjustments that needed to be made to the assets. In 2020 the Outsiders tested the 'Tap out for time out and avoid Bet Regret' assets to do the same thing and found that there were important differences in audience reactions based on age.

When a more behavioural nudge was added to the end frame of creative executions, research helped validate inclusion of behavioural messaging. When the frame of creative executions became 'Think Twice or You'll Bet Regret it', the Nursery Bet Regret creative review research used focus groups to gauge recall of the *Think Twice* message. Following the first iteration of "Tap out" creatives, depth interviews with bettors was used to test different ways of delivering this message, through creative route concepts.

Adapting to changing circumstances

Testing the impact of the campaign without a famous talent. The impact of the coronavirus pandemic meant it was not possible to use a well-known WWF wrestler from the US in the 'Tap Out to Time Out' creative. Research conducted by the Outsiders was used to test whether the ad still had impact amongst bettors without the famous wrestler.

Sense checking betting scenarios that during COVID-19 were no longer directly applicable. Many of the scenarios planned to be used in the ads did not match the reality of COVID-19, such as depicting places where people had restricted or no access to like pubs and cafes. The Outsiders creative development research June 2020 tested whether audience reactions had changed in the new circumstances of the pandemic. Ipsos MORI's tap out messaging research in December 2020 used different scenarios in the

revised creative concepts, such as depicting bettors tapping out whilst sat in their living room watching sport.

1.5 Measurement

This chapter reviews the role of tracking research in helping provide regular feedback on exposure to, and impact of, the Bet Regret campaign.

Exposure to the campaign

The tracking research helped validate the campaign media strategy - recognition was high and well-targeted. Recognition of the campaign was consistently higher among target groups, with as many as 77% of those identified as high-risk having recognised the campaign, three times more likely than the non-gambling audience. This showed the media strategy to be effective and efficient at reaching key target groups.

The tracking research also showed the campaign to have significant cut through despite a relatively small share of voice against other gambling ads. The unprompted recall of any form of advertising that promoted a safer gambling message demonstrated the challenge of Bet Regret competing with gambling adverts that have much higher spend. For example, it was more common for respondents to recall elements of the message 'When the Fun Stops Stop'.

Performance of the campaign

The campaign was well received and viewed as memorable, entertaining and engaging. Feedback from the tracking research showed that respondents found the campaign assets entertaining and memorable whilst also being relatable and relevant. This helped validate the campaign approach of using humour and fictional elements.

The campaign was most relevant among those who were taking or thinking about taking action to reduce their betting. Wave 7 of the tracking research showed that around half of the Campaign Audience (49%) exhibited some risky betting behaviours but were either taking action to moderate their behaviour or intended to in the future; further investigation confirmed that the campaign resonated most strongly with this target audience. This helped validate the cut through of the campaign, and provided important context for judging shifts among wider campaign audiences.

The key messages of the campaign were clear and well understood, with notion of Bet Regret and Think Twice ever-present within evolution of the campaign. The successful delivery of key campaign messages was evident throughout the tracking research, from landing the feeling of 'Bet Regret' to using the concept of Tap Out for Timeout as a mechanism to emphasise the need to pause and think twice before placing a bet.

The campaign was most likely to inspire action among target groups, including traction on notion of Tap Out. Though the Campaign Audience overall responded positively to campaign assets; higher-risk bettors were more likely to talk about it, think about their betting behaviour, and consider Tapping Out.

Impact of the campaign

Awareness of BeGambleAware increased over the course of the campaign. The tracking research suggested that the campaign had a positive effective on the brand of BeGambleAware. Overall awareness increased from 81%-92% among the Campaign Audience; likelihood of using the BeGambleAware helpline and website also increased among high risk groups.

The campaign had less impact on levels of self-awareness of key risks and knowledge of how to cut down, which were already high. Early waves of the tracking research showed high levels of claimed knowledge and self-awareness among the Campaign Audience; these metrics remained broadly consistent throughout the campaign. This provided reassurance that the campaign should focus on supporting those looking to take action to moderate their betting rather than seeking to increase knowledge and self-awareness overall.

The campaign was successful in raising consideration of 'Tap Out' and pausing to take a moment before placing a bet. The tracking data showed that the call to action to Tap Out was both relevant and accessible to target groups, and that the execution of the campaign had been successful in building momentum. The amendments made to the campaign execution ahead of the final burst to clarify this action were shown to have further embedded this behaviour. Future campaign evaluation will establish whether these behaviours have been maintained.

Ability to assess the impact of the campaign on betting behaviour was complicated by the coronavirus pandemic. The tracking data demonstrated clearly that the goalposts had changed, and that shifts in betting behaviours were also impacted by external events outside of the control of the campaign. This was most evident in spikes in *betting whilst bored* and on *sports I know little about*, especially among high-risk bettors.

Impact on proportion considering or taking action has been limited to date; overall, target audiences were no more likely to report that they have completely cut out moments of BetRegret. Though these findings should be treated with caution due to the impact of the coronavirus pandemic, they suggest that there is room to further improve the impact of the campaign on changing behaviour. This has provided valuable impetus to continue to review and improve the execution of the campaign.

1.6 Learnings and conclusion

Overall, it's clear that the Safer Gambling Board has taken an evidence-based approach to the development of the Bet Regret campaign. The commitment to make decisions based on latest available evidence is witnessed by the scale of investment in research – to date is equivalent to almost 10% of media expenditure.

Research was used throughout the lifecycle of the campaign to:

1. Inform the overall strategy and aims for the campaign;
2. Inform the initial creative brief;
3. Provide feedback on which concepts and executions had the most desired effect;
4. Monitor exposure to the campaign and evaluate the media strategy; and
5. Evaluate the impact of the campaign and identify potential improvements.

The commissioning of research has been both proactive and agile. Perhaps most importantly, the campaign has acted on the insight provided by the research, adapting and evolving in line with the evidence presented in order to maximise the potential impact of the campaign. There was a strong commitment to investing in research to inform all key decisions – while procurement was cost-conscious (with competitive proposals sought at every stage), approaching 10% of the total campaign budget was allocated to research. GambleAware is committed to sharing learnings based on the research undertaken, as witnessed by this report (itself peer-reviewed) and the narrative report.

Key strengths of the evidence-based approach commissioned by the campaign are its flexible and creative approach to insight. The Bet Regret Campaign benefitted from a more agile approach to research, either delaying or quickly commissioning fresh insight to make best use of research budget and to ensure the

findings were relevant and timely. Adopting an agile approach will be important for future public health campaigns to adapt to external circumstances such as COVID-19. Innovative methods were also used to better understand the attitudes and behaviours of bettors, including using mobile app diaries and self-ethnography to record the performance of early behavioural nudge concepts⁶. Finally, the campaign made good use of the re-contact sample it has developed for further research. Two additional projects were commissioned using this sample to help develop behavioural messaging.

As the campaign has evolved over time, there are a number of opportunities to help improve the quality of feedback provided through research. These include refining the target audience by placing greater emphasis on tracking the experience of those looking to or currently taking action to moderate their betting behaviour, asking more detailed follow-up to those not responding to the campaign, and reviewing key performance metrics to ensure they truly capture the impact of the campaign.

Future public health campaigns would also benefit from more secondary behavioural data (where anonymised betting operator data may be made available) and/or the use of longitudinal tracking to gain a more accurate understanding of changes in behaviour.

⁶ Further information is contained in Figure 2.1 and at 3.1.

2 Introduction

2.1 Campaign and report overview

In 2017 the Department of Culture, Media and Sport (DCMS) identified a need for an advertising campaign to promote safer behaviour and/or warning of the risks associated with gambling that would provide some balance to existing commercial advertising in the sector. GambleAware trustees supported a proposal from the Advertising Association to run a major safer gambling advertising campaign to run for two years. Trustees' support for the proposal was contingent on the campaign governance following an evidence-based public health driven approach and be independent of the gambling industry. In October of 2017 GambleAware were named as the body that would lead a safer gambling campaign. The delivery of the campaign was overseen by an independent Safer Gambling Board.

Following the appointment of M&C Saatchi as the creative agency for the campaign in June 2018, work began developing a campaign strategy and logic model for the Bet Regret campaign. The overall campaign objectives were outlined as follows;

- **Year One:** To shift attitudes and provoke conversation on the moderation of sports betting, through the avoidance of impulsive, risky behaviours such as chasing losses in the heat of the moment
- **Year Two:** To increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids

More information about the Bet Regret Campaign can be found in the 'Story of Bet Regret' campaign narrative report.⁷

Throughout the first two years of the campaign, research has been used to help develop and implement the Bet Regret campaign and to ensure that it was delivered in accordance with an evidence-based public health driven approach. To date, the Safer Gambling Board have commissioned nine strands of research to inform the development of the Bet Regret campaign.

Ipsos MORI have written this synthesis report on behalf of the Safer Gambling Board with a specific focus on the role and value of research in the implementation of the campaign. It will also share what learnings there are for potential future innovations relating to the use of research in evaluating public health campaigns of this type. The report draws on data and insights from all nine strands of research carried out during the Bet Regret campaign; these are summarised in section 2.2. below.

It should be noted that the key learnings and recommendations in this synthesis report represents the views of Ipsos MORI, and do not necessarily represent the views of all the authors who contributed to each research study.

2.2 Sources of evidence

Figure 2.1 and 2.2 present an overview of the research that was carried out as part of the Bet Regret campaign. The variety and quantity of research commissioned by GambleAware demonstrates how iterative and agile the approach was to using research during the campaign.

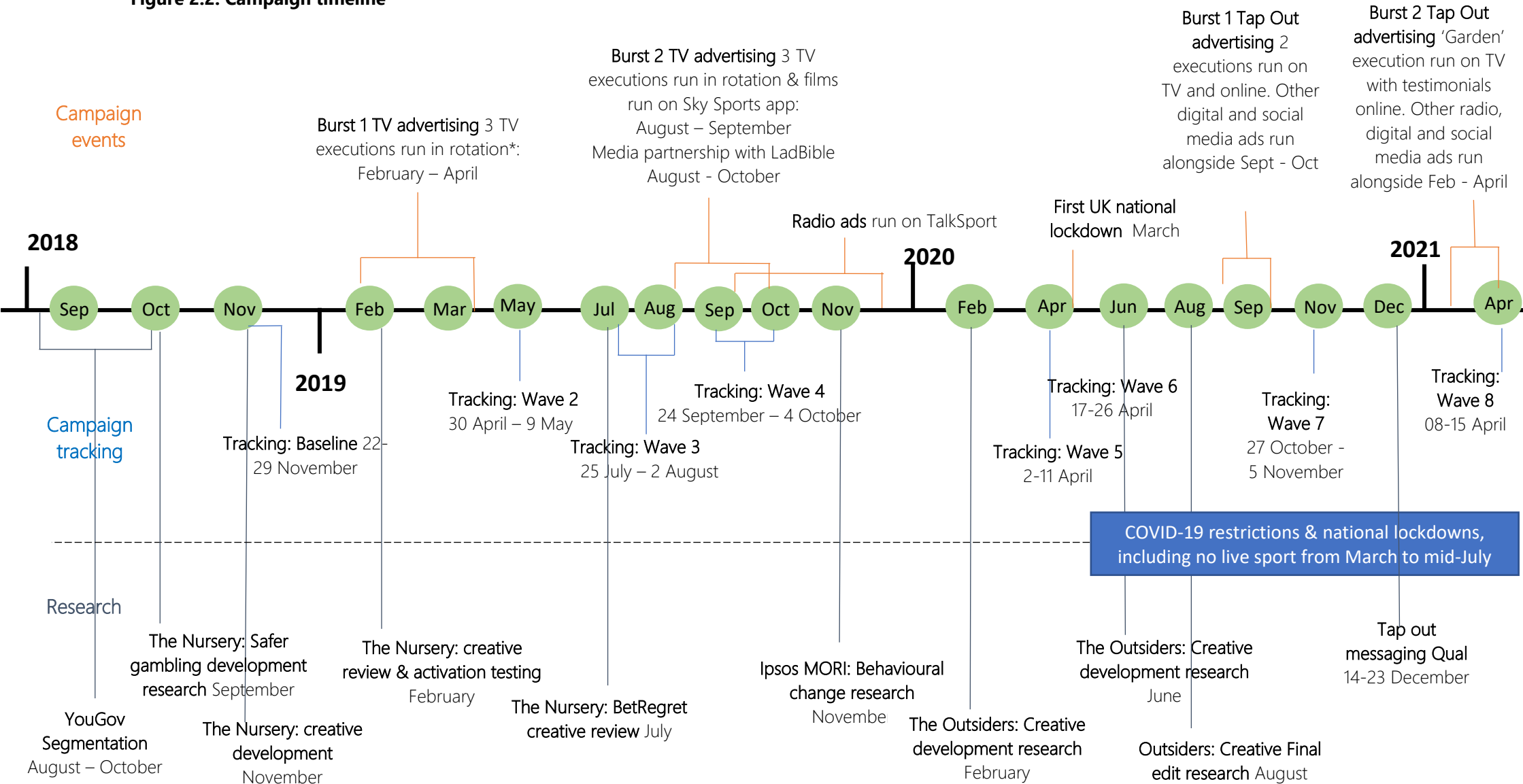
⁷ <https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

Figure 2.1: Sources of evidence

Research strand	Purpose	Method
YouGov segmentation, August - October 2018	To capture the gambling attitudes, perceptions and behaviours of male bettors in the UK. The study also identified six different types / segments of bettor based on these attitudes, perceptions and behaviours. In the early stages of campaign development, details of these segments were used to help identify and understand the campaign audience.	A survey of c.2000 male bettors aged 16-45 from across the UK was conducted between August and September 2018. Statistical analysis was then used to create 6 segments male bettors.
The Nursery: Safer gambling development research, September 2018	To understand how bettors feel about gambling and about their gambling behaviours, and to explore ways to communicate with frequent bettors, to motivate them to self-reflect and ultimately moderate their gambling behaviour. Along with findings from the segmentation, insights from this research helped guide development of the campaign strategy.	Four focus groups with frequent male bettors aged 18-34.
Ipsos MORI Tracking Waves 1-8, Nov 2018 – April 2021	Tracking was used to capture exposure to the campaign and any changes in the attitudes and behaviours of those within the target audience. Tracking also provided a way to learn what viewers of the campaign thought about it, and about their gambling more generally.	Eight waves of online survey tracking were conducted with the target and wider campaign audience. c.1,600 responses per wave.
The Nursery: Creative development research, November 2018	To explore new creative ideas produced by M&C Saatchi and provide recommendations of the best routes to take forward for further development. Using focus groups meant research could explore bettors' spontaneous reactions to creative.	Focus groups with frequent male bettors aged 18-35 in London, Cardiff and Glasgow.
The Nursery: Creative review and activation idea testing, February 2019	To sense check two films and out of home ads before they were launched, and to explore a series of new brand activation ideas. The final sense check of creative assets identified whether last minute amendments needed to be made.	Focus groups with frequent male bettors aged 18-35 in London and with their partners. Two groups were conducted with male bettors, and one with the female partners of those from the male groups.
The Nursery: Bet Regret creative review, July 2019	Focus groups were used to explore new creative ideas for the campaign and to explore the extent of recall and takeout of the 'Think Twice' message from creative.	Focus groups with frequent male bettors aged 18-35 in London, Cardiff and Glasgow.
Ipsos MORI: Behavioural	Having decided that the second iteration of the campaign would need some sort of behavioural	73 bettors trialled the 'tips' for 12 days and kept an online progress journal.

change research, Nov. 2019	nudge, an online trial of four nudges was used to test their usability and impact on bettors' behaviour. The trial provided in situ insights on how bettors used the advice given under each nudge. The research recommended which behavioural nudge would be most impactful for bettors.	Surveys at the beginning, middle and end of the trial, and 12 follow-up interviews were also conducted.
The Outsiders: Creative development research Feb 2020	New creative was developed and produced for the second stage of the campaign, and focus groups were used to explore the creative idea before it was fully developed.	9 focus groups were held across three different occasions with the target audience to test creative work developed as part of the second stage of the campaign.
The Outsiders: Creative development research June 2020	Due to Coronavirus the Tap Out campaign could not include a wrestling famous talent from the US, so focus groups were used to validate the impact of the campaign without a famous talent. They were also used to sense check the betting scenarios in the time of COVID-19.	3 online focus groups were conducted were frequent male bettors. Participants came from a mix of locations from across the country.
The Outsiders: Creative development research August 2020	Focus groups were used to establish if the campaign's creative assets needed any final tweaks before their launch.	3 online focus groups were conducted were frequent male bettors. Participants came from a mix of locations from across the country.
Ipsos MORI: Tap out messaging refinement research, December 2020	Depth interviews were conducted to test concepts for creative routes designed to refine the Tap Out message. This followed tracking results that showed the need to further encourage take-up of tapping out amongst those trying to cut down their betting.	15 online depth interviews with those who: <ul style="list-style-type: none"> • Bet using an app • Have elicited some risky betting behaviours, and taking action to cut down • Vast majority did not already use tapping out as a technique to cut down

Figure 2.2: Campaign timeline



* films also ran continuously on YouTube, and on digital and social media (Facebook, Twitter and Instagram) from March – December 2019

3 Strategy Development

This chapter reviews the role that strategy development played in the Bet Regret campaign. It draws on research conducted in both years of the campaign, by YouGov, The Nursery Research and Planning, and Ipsos MORI.

3.1 Research overview

YouGov: Frequent Gambler Segmentation Study August - October 2018

This research explored the behaviours and attitudes of frequent male bettors across the UK. YouGov conducted a quantitative survey of 2,097 men aged 16-45 in the UK who have gambled (bet online or in person on sports, or online casinos) in the last four weeks. Fieldwork took place between the 17th August and 5th September 2018 with figures weighted to be representative of the UK male gambling population by age, region and social grade. Survey data was used to conduct a factor analysis that identified key discriminating variables and a cluster analysis of respondents based on these variables identified six segments.

The Nursery: Safer Gambling Development Research September 2018

The Nursery conducted four focus groups with male frequent bettors aged 18-34 from a mix of social grades. Respondents were required to bet on sports or casino games more than twice a week, and were screened to ensure they aligned with the target audience.⁸ Fieldwork took place in Glasgow and Watford on 29th and 30th August 2018.

Ipsos MORI: Behavioural Change Research November 2019

To help inform the second stage of the campaign, which was to include some form of behavioural nudge to support bettors reduce risky bets. Ipsos MORI therefore carried out an online trial of four behavioural nudges.⁹ Respondents were drawn from waves 2-4 of the campaign tracking. Given the need to establish the performance of each nudge in a real life setting, a largely qualitative approach that monitored a small number of bettors over time was chosen. After completing an introduction survey (which included choosing from between two of the four nudges which they would like to try) the 73 respondents trialled one of the four tips for 12 days (including two weekends of Premier League football). During the trial period, respondents filled in a progress journal to capture ongoing progress with the nudge they had been assigned, and also filled in a mid-way survey after the first weekend of the trial. At the end of the 12 days a final feedback survey with all respondents and follow up tele-depths with 12 respondents captured their final thoughts on how usable and impactful their behavioural nudge had been. The survey data captured how much they had used the nudge and how impactful they felt it had been.

3.2 Understanding the audience

During the strategic development stage of the campaign, research proved crucial to understanding the behaviours, attitudes and perceptions of frequent male bettors in the UK.

⁸ These statements were taken from the Problem Gambling Severity Index (PGSI). More information on the PGSI can be found here - <https://www.gamblingcommission.gov.uk/news-action-and-statistics/Statistics-and-research/Problem-gambling-screens.aspx>

⁹ The details of how the behavioural nudges were conceived and developed for research is detailed in the campaign Narrative Report: *Safer Gambling Campaign Development: Avoiding Bet Regret; an overview of the campaign to date; December 2020*. <https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

3.2.1 The YouGov segmentation used cluster analysis to identify key characteristics of the most risky bettors

In the quantitative survey conducted as part of the YouGov segmentation, questions were asked relating to gambling attitudes, perceptions and behaviours. Factor analysis was carried out to reduce the number of variables in the data and they were grouped into similar areas. Cluster analysis was then applied to look for patterns in respondents' attitudes, and segments who share similar attitudes and perceptions were established.

Six segments were identified, each having their own set of attitudinal and behavioural traits. The segmentation highlighted that the minority of bettors in this profile are likely to be 'risky bettors' - the higher risk segments A, B, C made up a 32% of the total audience compared to 69% identified as 'low risk'.

The segmentation further identified the complex interaction between betting behaviours, attitudes and attributes of self-reflection, and showcased the wide range of betting profiles within the target audience demographic of young male bettors. Bettors exhibiting risky behaviour were shown to require a range of interventions and support – for example, within Segment B (the highest risk group), a small proportion were unaware that they should cut down their gambling¹⁰; and although most wanted to cut down (80%), only 59% were actively taking steps to change their gambling habits.

The segmentation also captured demographic sociodemographic and media consumption profiles of bettors, revealing the key attributes of those exhibiting the most risky behaviours that could be used to help reach those most likely to benefit from the campaign.

Figure 3.1: Segmentation overview

Audience	Betting traits	Sociodemographics
Segment A (10%): (High Risk).	Gambles more than others to relax and escape from the stresses of life – they bet frequently, often exhibiting risky behaviours, such as chasing losses	Lower income, more likely to be married and have children, and more likely to be in London and the West Midlands. Get their news through traditional means –the TV and newspapers, but also read blogs. Highly engaged with media overall, but less so social media.
Segment B (10%): (Higher Risk).	Tend to struggle with gambling as they often do with other things in their life – low ability to delay gratification	More likely to be C2DE, as well as unemployed or not working. Fairly average media usage, with a higher likelihood of reading The Sun. Less engaged with politics in general, but describe themselves as “centre”.
Segment C (12%): (Medium Risk).	They are regular bettors across sports, more than others see betting as a test of their knowledge and skill – but still sometimes display risky behaviours	Bigger TV watchers than average, using it to stay informed. Readers of The Sun, The Metro and The Daily Mail. Susceptible to advertising influence. Big sports fans and enjoy their free time.

¹⁰ 22% agreed that 'I don't think I gamble too much'

Segment D (23%): (Low risk).	Moderate and relatively infrequent bettors – enjoy the excitement of betting but are reasonably self-aware and in control of it	Less engaged with most forms of media, but average social media habits. Less influenced by online advertising.
Segment E (25%): (Low / No risk).	Bet for a little bit of fun, and find that it adds spice to the excitement of the sports they are fans of, especially football	Older segment. Less engaged with newspapers. More likely to watch terrestrial television channels. More likely to be right wing voters.
Segment F (21%): (Low / No risk).	Just make the occasional bet from time to time – see themselves as dabblers, not habitual bettors	Less likely to have children. More likely to get their news from TV, but less likely to watch it in general. Less likely to read newspapers. Engaged with Instagram and Reddit. More left wing and more likely to have voted to remain in the EU.

Outcome:

Segments A, B and C (comprising 32% of the total sample) were identified as a key focus for any future campaign intervention. They make up 42% of all those who gamble 3+ times a week, and 87% of those scoring as medium risk or problem gambler based on PGSI problem gambling indicators, with reasonable numbers expressing readiness to cut down.

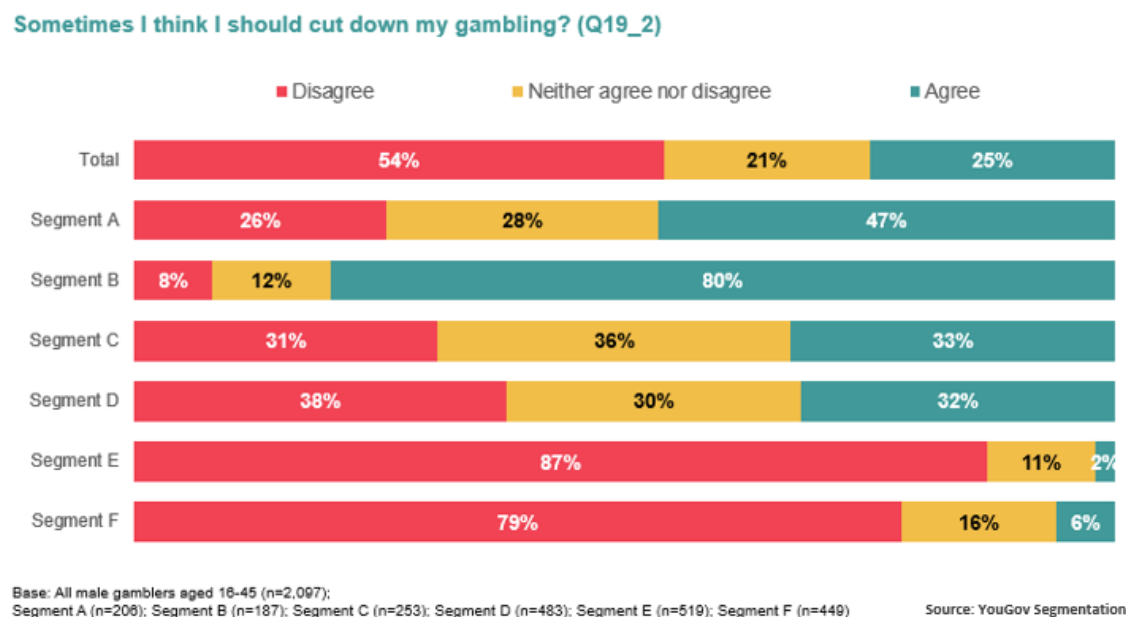
Details of these three segments were used to inform media strategy and target groups for any future behaviour change objectives. It also fed in to informing the recruitment process for focus groups conducted by the Nursery in year 1 of the campaign, and recruitment for the campaign tracking run by Ipsos MORI throughout the campaign.

3.2.2 Readiness to change gambling habits was higher amongst high risk bettors than low risk bettors

Of the six segments identified in the YouGov research, the three segments (A, B and C) that had a higher incidence of high-risk bettors showed more willingness to change their gambling behaviour. Nearly half (47%) of segment A agreed that they think they should cut down their gambling, rising to 80% amongst segment B, and a third (33%) amongst Segment C.

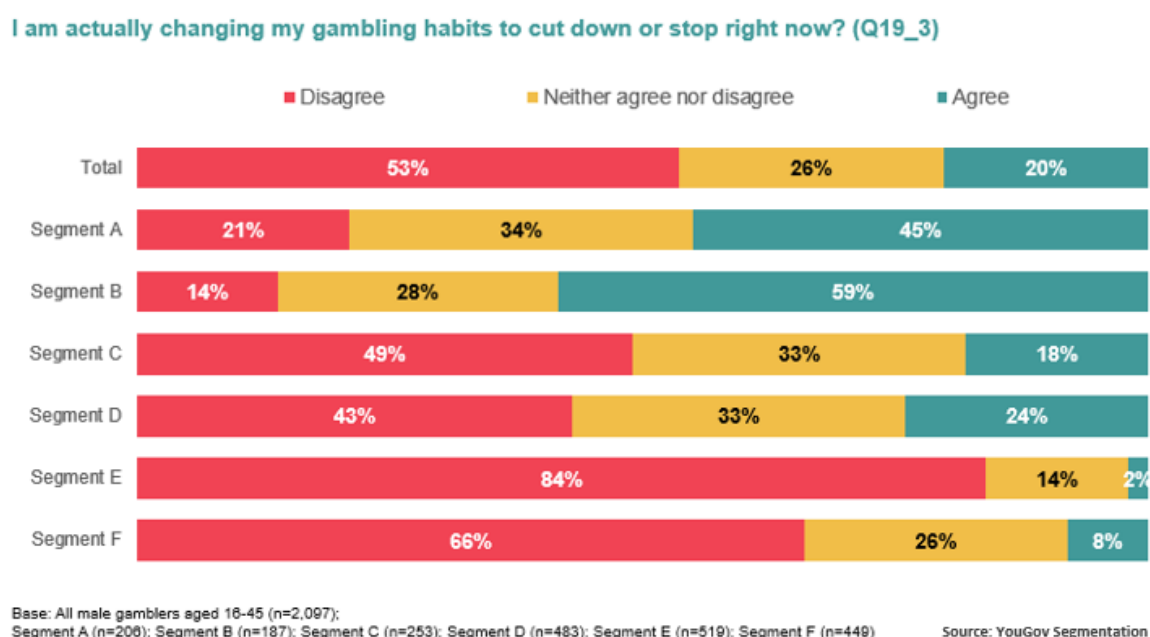
The lower risk segments (D, E and F) were significantly less likely to think they should cut down their gambling. A third (32%) of segment D agreed, decreasing to 2% of segment E and 6% of segment F.

Figure 3.2: Levels of agreement with the statement ‘Sometimes I think I should cut down by gambling’ by segment



Similarly, higher risk bettors were more likely to already be taking steps to try and change their betting habits. One fifth of all surveyed (20%) agreed with the statement ‘I am actually changing my gambling habits to cut down or stop right now’, but amongst the higher risk segments (A-C) agreement was higher – as high as over half (59%) in segment B.

Figure 3.3: Levels of agreement with the statement ‘I am actually changing my gambling habits to cut down or stop right now?’ by segment



These findings from the YouGov segmentation were corroborated in the focus groups conducted by the Nursery in September 2018. The focus groups spent time exploring what measures bettors would be willing

to put in place to maintain safe gambling or to cut down. Through exploring what ideas they believed would be effective, it was clear that many high or medium risk bettors were already thinking about ways they could cut down.

Outcome:

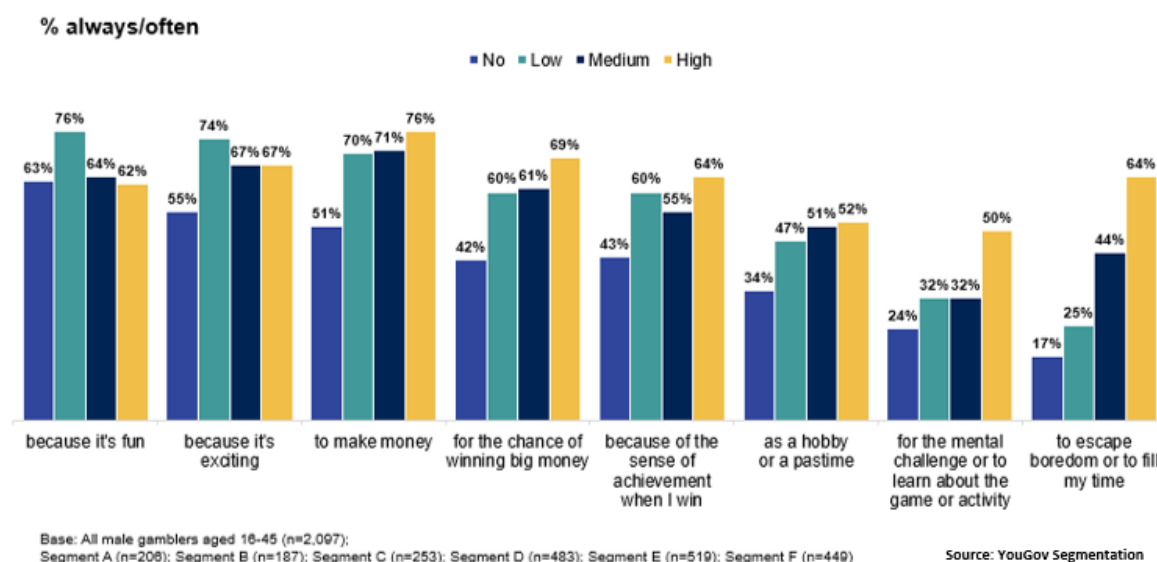
Within the broader campaign audience, GambleAware identified that preventative behaviour interventions would be most relevant to higher risk, more frequent bettors. In year 2 of the campaign, this led to the Ipsos MORI Behavioural Change Research (November 2019) that tested four potential behavioural 'nudges' with high risk bettors.

3.2.3 Higher risk bettors are more likely to gamble to escape boredom, whilst low risk bettors are the most likely to gamble for fun

In the YouGov segmentation bettors were asked what they thought were the reasons why they themselves took part in gambling. Over half (64%) of higher risk bettors believed they gambled to escape boredom or to fill their time compared to only a quarter of (25%) of low risk bettors saying the same, and fewer (17%) no risk bettors.¹¹ 'Betting when bored' became one of the 'Avoid Bet Regret' scenarios used in the first stage of the campaign.

In contrast to this, the most common reason for low risk bettors to bet was because it's fun. Over three quarters (76%) of low risk bettors felt fun motivated them to gamble compared to 64% of medium risk bettors and 62% of higher risk bettors.

Figure 3.4: Reasons cited as to why frequent male bettors gamble by risk level



Other reasons higher risk bettors were most likely to cite, compared to mid and low risk bettors, as why they bet were because it helps when they are feeling tense and that it helps them to relax. Nearly half of high risk bettors bet to relax (44%) and bet because it helps when they are feeling tense (43%) compared to only one

¹¹ The segmentation used the Problem Gambling Severity Index (PGSI) to determine whether participants were low, medium or high risk gamblers. More information on PGSI scoring can be found here - <https://www.gamblingcommission.gov.uk/news-action-and-statistics/Statistics-and-research/Problem-gambling-screens.aspx>

fifth (20%) of low risk bettors saying they bet to relax or under a tenth (9%) who say it helps when they feel tense.

Outcome:

A thorough understanding of why individuals bet and the scenarios in which they do so helped inform the selection of which real life situations to depict in the campaign execution, and highlight as attributes of risky betting – for example betting whilst bored. Campaign tracking was able to further explore the relevance of the situations betting when bored and betting.

3.2.4 Betting behaviours vary greatly between individuals and common ground is elusive

In the focus groups conducted as part of the Nursery Safer Gambling Development Research (September 2018), it was established that finding behavioural common ground amongst bettors is very hard to do. Discussion of everyone's betting habits and routines revealed that a long-standing habit for one gambler could easily be considered out of the ordinary for someone else. Similarly, a big loss could be an irritant for some, but for others could mean that they could not pay their bills at the end of the month. Either way, as the quote below demonstrates, bettors felt that establishing what was typical behaviour was too difficult for anyone to attempt.

“Betting is different for every single person, so each person has their own normality. GambleAware can't say what's normal and what's not”

The YouGov segmentation also indicated significant variances in behaviours amongst bettors, specifically in the amount of time spent gambling in a day and what time of day they usually gamble. One fifth (20%) of both segments A and B spend two hours or more a day gambling compared to only a small minority of segments D (4%), E (3%) and F (1%). Similarly the majority of segment F (68%) only spend 15 minutes or less a day gambling compared to one tenth (12%) of segment A. The time of day varied significantly between segments too, with nearly half (41%) of segment A saying they gamble during the week late at night compared to less than a tenth of segments D (9%), E (6%) and F (4%) also saying they gambled then.

3.2.5 The emotional journey of a bet provides more commonalities amongst bettors than behaviours

The Nursery Safer Gambling Development Research used focus groups to explore the journey that bettors go through when they place a bet. Bettors were asked to explain how they felt at different stages of the bet, from initial consideration, to placing the bet, through to finding out the result. The research found that the emotional journey the bettor feels was considerably more universal than their behaviours and routines. In groups, participants struggled to agree on what an affordable bet was, or how often was too often to be placing bets; however, they did identify the different stages of placing a bet and agree on what emotions they experienced at each stage. This included; confidence before placing the bet moved to excitement having placed it; then depending on the outcome ended in relief or disappointment and frustration.

“Betting is always motivated by thinking I know what's going to happen”

As the quote from one group participant above suggests, the research showed that bettors were confident in predicting how they would feel when betting.

Outcome:

The fact the behaviours were so varied amongst bettors, but the emotional journey more universal led to the conclusion that the campaign should focus on the universal emotions experienced by everyone in their betting journey. The brief for creative development was therefore to focus not on defining what an impulsive, ill-considered bet is, but on how it feels.

3.3 Insights for creative development

Strategic development research provided crucial insights that were fed into creative development stages of the campaign.

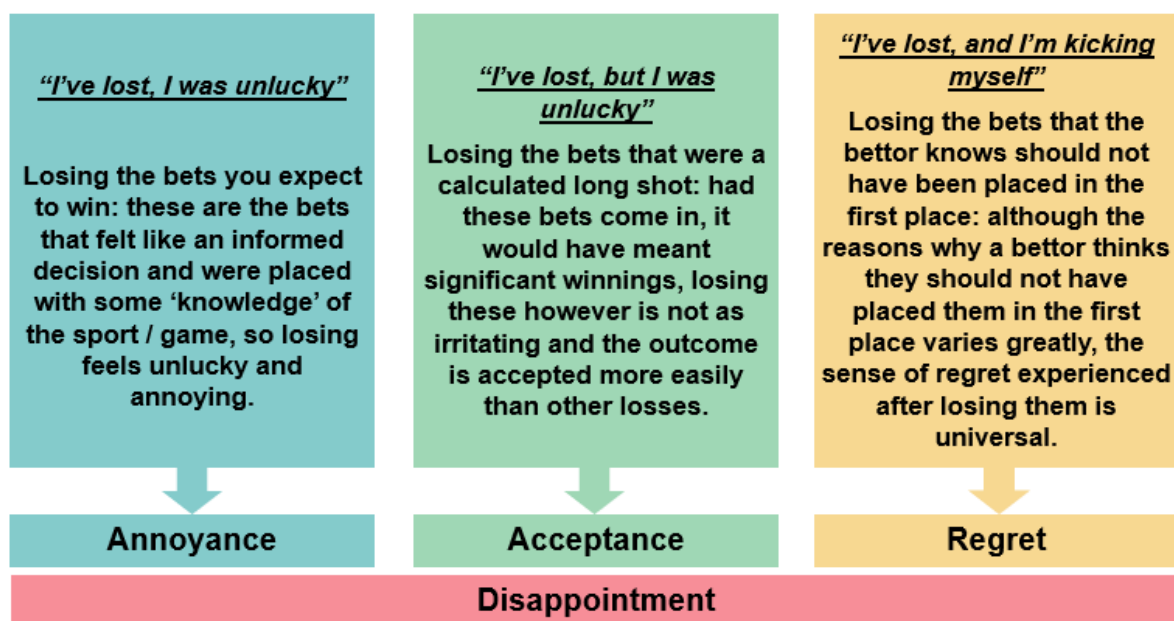
3.3.1 There are important perceived differences between betting and gambling

Focus groups conducted as part of the Nursery Safer Gambling Development Research September 2018 revealed the subtle but clear differences between the discourse around betting and the discourse around gambling.

Fundamentally, gambling feels much more loaded as a term than betting. Bettors feel that gambling has a 'bad press' and is seen as more serious and addictive than betting. Betting however was not associated with addiction but with skill in the minds of the male bettors who took part in groups. When asked to associate words with 'betting', participants came up with 'strategic', 'tactical' and 'knowledge'. When asked to do the same thing with 'gambling', they came up with 'risk', and no one mentioned anything to do with skill or knowledge.

3.3.2 The idea of 'a bet you kick yourself for' resonated strongly with bettors

The Nursery Safer Gambling Development Research with bettors revealed that the feelings attached to losing a bet has considerable emotional resonance and potential in getting bettors to reflect on their behaviour. The research uncovered three key types of loss experienced by bettors:



The loss experience that had the most potential for campaign development was identified as *losing the bets that bettors knew they should not have placed*. Bettors strongly related with this type of loss and the feeling of regret that accompanied this sort of loss was very relatable across all focus groups.

Outcome:

This insight from consumer research led to a brief for creative development in which the key thought to express in the creative routes was 'watch out for the bets that you kick yourself for as soon as you make them' – taking the Nursery insight further than just regretting the bets you lost because you know you should not have made them in the first place. The creative agency M&C Saatchi then developed a number of creative routes around this brief which were tested and refined in two further stages of qualitative research with the campaign audience (The Nursery creative development research 2018 and The Nursery creative review and activation idea testing February 2019).

3.3.3 Bettors benefit from behavioural interventions which help reduce risky betting behaviours

In the second year of the campaign, the focus shifted from achieving broad recognition of risky behaviours to actively helping frequent bettors moderate their behaviours. GambleAware hoped to do this through developing a mental aid for bettors to use to cut out impulsive, ill-considered bets. The Ipsos MORI Behavioural Change Research conducted consumer trials of the four top 'nudges' that came out of a workshop with behavioural change scientists and academic experts¹². The research trial showed that each of the four nudges (detailed in figure 3.5) had different strengths but that all showed signs of successes with bettors.

Figure 3.5: Details for the behavioural nudges / tips that were tested

<p>SAY THE BET BEFORE YOU DECIDE</p> <p>It's easy to rush into making bets that you regret the moment you place them.</p> <p>Here's a tip that many people find useful – pause for a moment to check your bet by saying it to yourself before you place it, you can help avoid making the kind of impulsive bets that you kick yourself for after.</p> <p>So whenever you are about to make a bet, try to take a moment to say the bet out loud to yourself before you finally decide whether to make it or not.</p> <p>Does it still sound like a bet you want to make?</p>
<p>CLOSE YOUR APP BEFORE YOU DECIDE</p> <p>You know those bets you regret the minute you make them? You kick yourself for getting caught up in the moment and rushing into making them without really thinking about it.</p> <p>So here's a tip that many people find useful – whenever you are about to place a bet, try to take a few seconds to close your betting app before deciding whether or not to open it again and press that 'Bet Now' button</p> <p>Do you still want to place the bet?</p>

¹² Details of those involved in the development of the behavioural nudges can be found in the Narrative Report: *Safer Gambling Campaign Development: Avoiding Bet Regret; an overview of the campaign to date; December 2020*.
<https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

SET LIMITS

It's easy to lose track of your betting and bet more than you intend, and regret it after the event.

Here's a tip that many people find useful - you can set limits on how much money and time you want to spend on every betting app and website. Think of it like a safety net, it doesn't stop you betting but it stops you betting more than you intend.

So take a couple of minutes to set your limits on your betting apps – and then relax in the confidence that you won't be one of those people who spend more than you intend.

TAKE A QUICK LOOK AT YOURSELF

You know those bets you regret the minute you make them? You kick yourself for getting caught up in the moment and rushing into making them without really thinking about it.

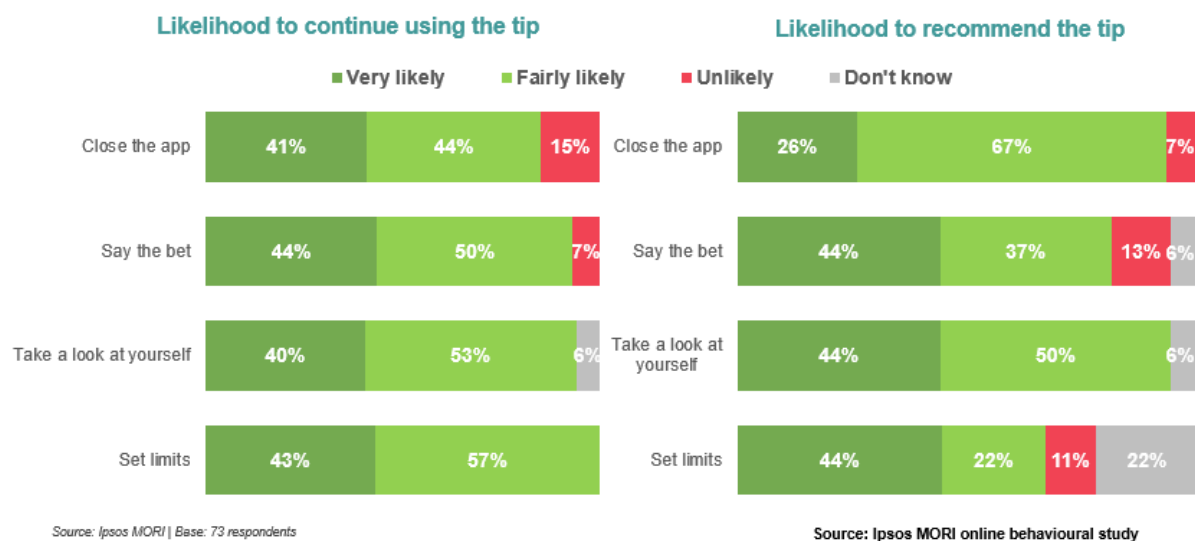
Here's a tip that many people find useful – taking a quick break to look at yourself before placing a bet, can help you avoid making those kind of bets.

So try to take a few seconds to take a quick look at yourself before you decide whether or not place a bet. For example, look at your reflection in your blacked out phone screen, or in a nearby window.

Does it still look like a bet you want to make?

Overall, the majority of bettors who took part in the trial were positive about the nudges. Figure 3.6 below shows that only a small minority said they were unlikely to either not continue using their nudge once the trial had finished or that they would not recommend it to a friend.

Figure 3.6: Likelihood to continue using the Tip, and likelihood to recommend the Tip



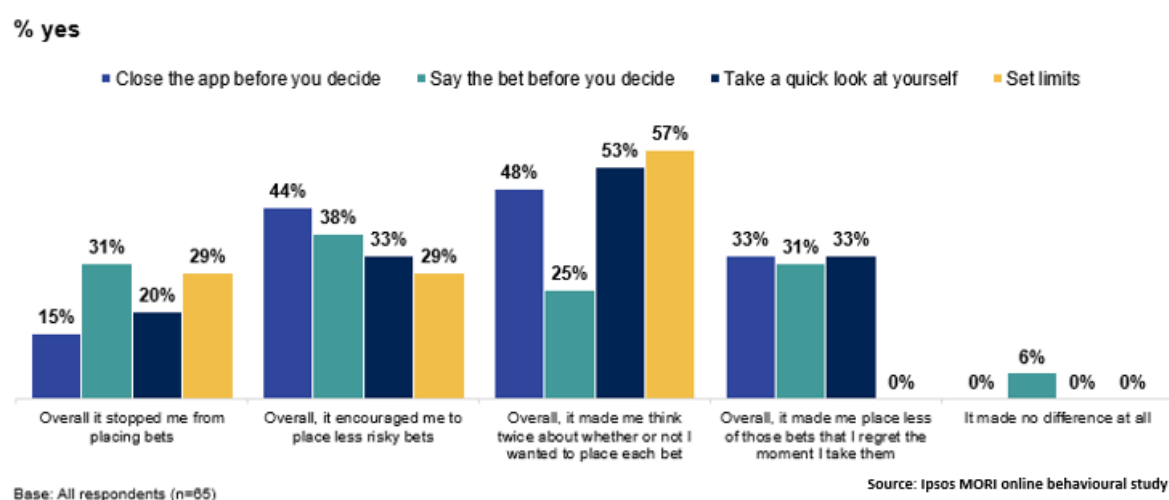
3.3.4 'Closing the app' was the most appealing behavioural intervention

Of the four different nudges trialled in the Ipsos MORI behavioural change research, 'Close the app' was the most appealing to frequent bettors. At the start of the trial period, bettors were given a choice between two of the four nudges about which they would like to try out for the 12-day period. This was to try to understand how likely bettors would be to adopt the nudges outside of a research context, as this would be crucial to overall campaign impact. Figure 3.5 shows the form that the nudges were presented in to participants; they had the chance to read how the two nudges worked before making their decision. Close the app was the most commonly chosen tip, followed by Say the bet.

Furthermore, the survey completed at the outset of the trial revealed that the 'Close the App' nudge was expected to have the biggest impact on bettors' behaviour, and to be the easiest to incorporate in to a betting routine. In contrast, not everyone believed they would actually use 'Say the bet' or 'Take a look' nudge going forward, or that it would have an impact if they did use it. The appeal of Close the App was not limited to bettors' first encounter of it, however. Over the course of the trial, the tip was used consistently, whereas the other tips had low initial take up that took time to increase.

Close the app also proved to be impactful amongst bettors in ways that fit overall campaign objectives. This was evidenced not just in progress journals and follow-up interviews, but also in the final survey of all participants. Bettors who trialled Close the app were the most likely agree that their tip had encouraged them to place less risky bets, and also to make them place less bets that they regret the moment they make them. Qualitative response (bettors own words) also supported the decision to go with Close the app, demonstrating higher levels of engagement and enthusiasm. (It was also judged by communications practitioners to be easier to communicate in an impactful way).

Figure 3.7: Impacts of using the tip and the end of the trial



Outcome:

The behavioural trial had confirmed the value of the Bet Regret campaign championing a mental aid to support those looking to moderate their betting behaviours. As the potential of Close the App as a mental aid to help cut down on impulsive bets, the communications brief for year 2 of the campaign was to popularise the Close the App tip and make it memorable. M&C Saatchi, the creative agency, developed a number of creative routes to do this that were subsequently tested in focus groups conducted by the Outsiders (January 2020).

4 Creative development

This chapter reviews the role that creative development research played in the Bet Regret campaign. It draws on research conducted by The Nursery Research and Planning, The Outsiders and Ipsos MORI.

4.1 Research overview

The Nursery: Creative Development Research October-November 2018

The Nursery conducted 6 focus groups with frequent male bettors aged 18-35. Groups took place in three locations across the UK; London, Cardiff and Glasgow, and happened between 25-29 October 2018. The research explored three creative routes produced by M&C Saatchi and provided a recommendation for how best to take each forward for further development.

The Nursery: Creative Review and Activation Idea Testing February 2019

The Nursery research involved 3 focus groups in London on 6 February 2019. Two groups were conducted with frequent male bettors aged 18-35, and one group with a selection of the female partners of respondents from the other two male groups. Research was used to sense check two films and Out of Home ads before they were launched, and to explore new brand activation ideas.

The Nursery: BetRegret Creative Review July 2019

The Nursery conducted 6 focus groups across London, Cardiff and Glasgow with frequent male bettors aged 18-35. Groups occurred between 10-11 July 2019. Groups were used to explore new creative ideas for the campaign, and to explore the extent of recall and takeout of 'Think Twice' from the creative. The 'Think Twice' message was added as a behavioural nudge in anticipation of the overall campaign focus shifting in from building awareness to achieving behaviour change amongst bettors.

The Outsiders: Creative Development Research February 2020

The Outsiders conducted 9 focus groups and 32 5-minute follow up interviews with frequent male bettors across three locations: London, Cardiff and Glasgow. Research tested different creative routes that aimed to popularise the idea of closing the betting app to avoid Bet Regret.

The Outsiders: Creative Development Research June 2020

The Outsiders conducted 3 online focus groups with frequent male bettors aged 18-35. Respondents came from across the UK, with representation in England, Scotland and Wales. The research was used to validate the impact of the Tap Out Campaign without a famous talent, and to sense check scenarios used in the creative in the time of COVID-19.

The Outsiders: Final Edit Research August 2020

The Outsiders conducted a final 3 online focus groups with male bettors from a mix of locations. Research was used to carry out a final sense check of the films before their launch and establish if the creative assets needed any tweaks in terms of tone, comprehension, communication and appeal.

Ipsos MORI: Tap out messaging Research December 2020

Ipsos MORI conducted 15 online / telephone in depth interviews with male bettors, who were cutting down their betting but primarily had not used tapping out as a technique. The primary objectives of the research

were to test concepts that proposed refinements to the creative routes around the tap out campaign, with a view to understanding how to further encourage take up of the behaviour.

4.2 Refining creative routes

Throughout the campaign, creative development research was used to inform the process of developing and choosing the potentially most effective creative ideas.

4.2.1 Research was used to test different creative ideas against one another to inform decisions about which to take forward as part of the campaign

In the Nursery creative development research, conducted in November 2018, three creative routes produced by M&C Saatchi were explored in focus groups of frequent male bettors. Each creative idea was explored in turn, with time on each spent discussing its relative strengths and weaknesses and the imagined impact it would have on an audience of bettors, i.e. would it encourage safe gambling.

The three routes tested in groups were *Mug Bet*, *Don't bet on it* & *Sucked In* (pictured below). They were each intended to be further developed into TV ads but were still at the development stage. Therefore, moderators used scripts and visual mock-ups of what the finished ad might look like to test the ideas.

Figure 4.1: The three creative routes as shown to participants in the Nursery creative development research November 2018 (from left to right: *Mug Bet*, *Don't Bet On It*, *Sucked In*)



Through conducting focus groups in three locations across the country – London, Cardiff and Glasgow – the research revealed that there were important regional differences in bettors' reactions to the creative ideas. The characters in the *Mug Bet* idea for example felt like an unrelatable and exclusively London type of person to bettors in Cardiff and Glasgow.

The Nursery research made recommendations and suggestions for ways each creative route could be developed to be as impactful, resonant and relatable with its audience as possible. As the ideas were not finished products and still in the development stage, the research was able to make suggestions about ways each idea could be changed. This included suggestions about the tone, scenarios used, and which emotion to focus attention on.

Further qualitative research conducted by the Nursery, in July 2019, also tested different creative ideas in groups to explore the relative strengths and weaknesses of each. The ideas were also in the early development stages, and the research offered valuable insights for the creative agency to take forward when developing the campaign further.

Outcome:

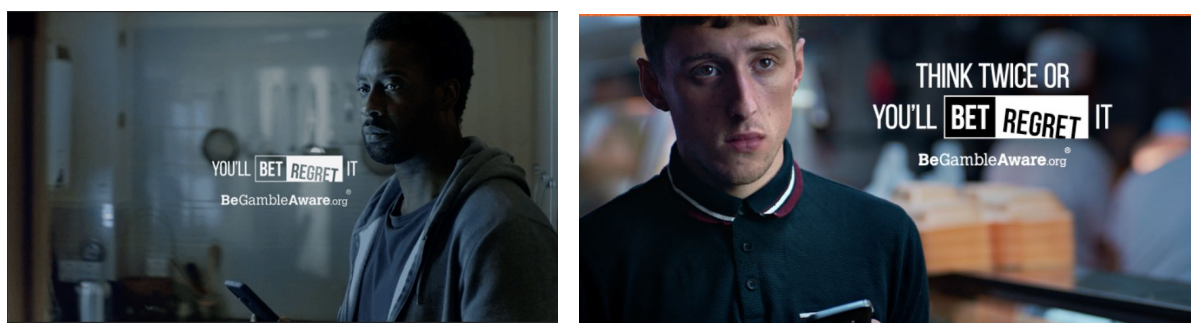
As a result of the research conducted by the Nursery in November 2018, the creative route *Mug Bet* was ruled out of consideration for being developed further as part of the Bet Regret campaign. Recommendations for how to develop *Don't bet on it* were taken in to account and the idea was turned in to the film used for TV and online advertising in stage 1 of the campaign.

4.2.2 Research was used to sense check assets before they were fully launched

In February 2019 and August 2020, creative development research was used to sense check ads in their finished form. The purpose of this was to establish if the creative assets needed any tweaks in terms of tone, comprehension, communication or appeal. It also could answer the question of whether it would attract enough attention, or whether further steps needed to be taken.

Before the first main wave of advertising in March 2019, the Nursery conducted three focus groups with frequent bettors and partners of frequent bettors. The research was used to sense check two films before their launch. Groups showed that although both films were well understood and the situations felt relatable, there was a perceived difference in tone between the two ads.

Figure 4.2: BetRegret TV ads



The *Kebab* film was seen as more light-hearted than the *Chasing losses* film, which was felt to be darker and more serious, with some even mentioning associations of addiction. This insight meant adjustments could be made to the film before its launch through adjusting the time spent on certain frames, specifically on the frame of the bettor stood alone in his kitchen, and to the lighting of the video.

Research conducted by The Outsiders in August 2020 tested the 'Tap out for time out and avoid BetRegret' assets in finished form before they were launched on TV, digital and radio on September 8th 2020. (NB. The creative route tested here had been chosen on the basis of earlier research – the Outsiders Feb. 2020 – in which 3 alternative creative routes were tested, each communicating the Close the app nudge in different ways). In focus groups conducted online with bettors from a spread of locations (including coverage in Wales and Scotland), moderators established whether bettors understood the message takeout, and whether the tone was perceived as too violent or too humorous. What came out of the focus groups was that the actions depicted were not perceived as too violent, and that the humour did not detract from the overall message.

Figure 4.3: 'Tap Out to Time Out' TV ad



Had bettors struggled to recall the action being suggested in the ads, tapping out, then there was the option to lengthen the end frame or to simplify the language used. Research showed however that bettors were easily able to recall the call to action of tapping out. The research also revealed that some assets were more impactful amongst younger audiences, and so was able to recommend targeting them at younger audiences.

4.2.3 Research helped validate the inclusion of behavioural change messaging

In the second burst of activity of the campaign, the same core content ran across all media, except in the second burst a more behavioural nudge was added to the end frame – 'You'll Bet Regret It' became 'Think Twice or You'll Bet Regret It'. This change in message was important to the overall campaign strategy, as it anticipated the shift that would happen in stage 2 of the campaign when the focus became achieving behaviour change amongst bettors.

In research conducted by the Nursery in July 2019, focus groups were used to explore the extent to which bettors took out 'Think Twice' from the ads, and how strong recall of the message was.

The research found that *Think Twice* as a message was easy to remember and understand. All bettors felt able to sign up to it as a call to action as it felt like good advice for whatever betting situation they were in but was not didactic.

Although the objective of exploring the resonance of 'Think Twice' was not the primary one in this research, it proved useful in avoiding any unexplainable drops in comprehension in the campaign tracking being conducted concurrently by Ipsos MORI.

4.2.4 Research was used to assess best ways to deliver motivational messaging and the campaign call to action

Following the launch of the 'Tap out' iteration of the campaign, further qualitative research was undertaken by Ipsos MORI to further understand how the campaign can successfully interact with bettors through its creatives to deliver the core call to action. The secondary aim of the research was to gather qualitative evidence on the tweaked executions, to ensure they landed positively with bettors.

Ipsos MORI spoke with male online sports bettors who were moderating their betting through some form of action, but primarily had not used tapping out as a moderation tool. GambleAware wanted to explore in more nuanced detail than captured in the quantitative tracking how these bettors interacted with the notion of tapping out, and how different creative concepts were able to deliver the same message in different formats.

Through online depth interviews, Ipsos MORI explored various concepts for creative routes, all of which centred around the tap out call to action. This included specifying a time-limited call to action, using renowned football coaches to deliver the message, and the use of testimonials from bettors themselves.

The Ipsos MORI research made recommendations around how each message landed with bettors, focussing less on the executions themselves (as these were incomplete concepts) and more on how motivating each approach was at delivering the call of action. The research also served to reaffirm the popularity of ambassadors and humorous scenarios used in the existing creatives as a successful way to engage the target audience.

Outcome:

Following the research conducted by Ipsos MORI in December 2020, refinements were made to the Tap Out executions, including a new execution which made the use of testimonials to deliver the Tap Out call to action. Content with champions was deemed to be a successful way of conducting the campaign message, and therefore further creatives with ambassadors such as David James were produced to supplement the primary campaign material.

4.3 Adapting to changing circumstances

The unprecedented circumstances that the Coronavirus pandemic created meant a lot of adjustments had to be made to the campaign schedule. Creative Development research was used to aid those adjustments.

4.3.1 Testing the impact of the campaign without a famous talent

Lockdown and related impacts on international travel meant that it was not possible to use a well-known 'WWF' wrestler from the US in the 'Tap Out to Time Out' ad, originally due to launch April 2020. With a government commitment to allowing live sport from July, the campaign was re-planned for a September launch in line with the start of the new football season. However, the continuing pandemic necessitated a move to a locally-available talent for the featured wrestler.

Creative Development research conducted by the Outsiders in January 2020 had explored the creative route assuming that a well-known WWF wrestler would be involved. The conclusion from these focus groups was that using a widely recognised wrestler added salience to the ad. When it became apparent that a using a famous wrestler was not possible, further qualitative research was conducted by the Outsiders in June 2020. A key objective of this follow up research was to validate the impact of the Tap Out campaign without a famous talent.

The follow up research concluded that without the famous wrestler the ad still had impact amongst bettors and was seen as memorable and relevant. Further, the wrestler put forward as the suggested local replacement, Drew, was known by some and was clearly a professional wrestler to those who did not know him.

Outcome:

Focus groups conducted by the Outsiders in June 2020 showed that not using a famous wrestling talent would not have a significant impact on the campaign, and so production went ahead with the suggested local replacement.

4.3.2 Sense checking the betting scenarios that during COVID-19 were no longer directly applicable

In the wake of the Coronavirus outbreak and subsequent social distancing measures, the suitability of certain aspects of the 'Tap Out for Time Out' creative routes came into question. Many of the scenarios planned to be shown in the ads did not match the reality of COVID-19. Also, the moves the wrestler was due to carry out on film would clearly not adhere to the social-distancing rules in place at the time. Focus groups carried out by the Outsiders in June 2020 were therefore used to explore the impact of COVID-19 on the creative assets.

The ads all depicted places which people now had a far more restricted access to because of Coronavirus, for example pubs, work canteens and cafes. In focus groups with frequent male sports bettors however, the Outsider research showed that the ads not depicting strictly COVID-19 compliant scenarios was not an issue. No respondents mentioned COVID-19 spontaneously in groups, and when probed no one thought it was an issue. Some in groups even welcomed seeing an ad set in places they used to be able to go to before COVID-19.

Similarly, the actions performed by the wrestler were not an issue for anyone, despite its lack of social distancing. Respondents all thought things would be back to normal and that in the meantime as escape from thinking about Coronavirus was a good thing, not as reason to disengage with the ad.

Outcome:

Focus groups conducted by the Outsiders in June 2020 to check the impact of Coronavirus on reactions to the ads, and the changes that had to be made as a result of the pandemic, provided the necessary reassurance to proceed with production of the 'Tap Out for Time Out' ads.

5 Measurement

This chapter reviews the role of tracking research in helping provide regular feedback on exposure to, and impact of, the Bet Regret campaign.

5.1 Tracking research overview

Ipsos MORI: Ipsos MORI Tracking Waves 1-8, Nov 2018 – May 2021

Ipsos MORI were commissioned to conduct a rolling programme of survey research to help evaluate the Bet Regret campaign. The design of the tracking research provided regular feedback on the performance and impact of the campaign; the objectives of the tracking research were to:

- Evaluate exposure to the campaign
- Provide feedback on asset performance
- Measure shifts in attitudes and behaviours
- Track evolution of the campaign
- Capture wider changes in prevalence of gambling in changing circumstances due to COVID-19

Overall, eight waves of tracking research were commissioned. Fieldwork typically took place before and after a media burst, providing valuable pre/post data on which to measure shifts in attitudes and behaviours.

All surveys were conducted online using the Ipsos MORI Online Access panel. Most waves comprised of a total of c.1,600 responses across two separate samples: 600 responses from the Campaign Audience, and a 1,000 from a nationally representative sample of all adults.¹³ The table below provides a further breakdown of the key subgroups tracked throughout the study. In addition to the waves of regular tracking, a further short survey was conducted in November 2019 with 200 males aged 16-44 who bet on sports or on online casinos living in the UK (matching the Campaign Audience in the main tracking). This survey was used to specifically test the recognition and value of campaign assets featuring David James¹⁴.

Audience	Definition	n=
Campaign Audience	Frequent male bettors aged 16-44	600
Behaviour Change Audience	<i>(Subset of Campaign Audience)</i> Males aged 16-44 who bet on sport online and/or football, and who bet at least twice a week	385
High Risk Gamblers	<i>(Subset of Campaign Audience)</i> Males aged 16-44 scoring in the top band of risk statements at Q10	252

¹³ The exception is Wave 3, which was only asked of 600 members of the Campaign Audience.

¹⁴ The initial David James activity had started after Tracking Wave 4, and so not covered in it –this was covered in later Tracking waves, but specific research was undertaken to inform immediate media decisions before the next standard tracking wave.

Bet using an app	<i>(Subset of Campaign Audience)</i> Males aged 16-44 who typically bet using an app on a smartphone or tablet	426
All adults	Full general adult population	1,000
Wider gambling Audience	<i>(Subset of All Adults sample)</i> General adult population who gamble frequently	522
Non-gambling Audience	<i>(Subset of All Adults sample)</i> General adult population who do not gamble	478

5.2 Overall evaluation against intended outcomes

5.2.1 Campaign was most successful at raising awareness of Bet Regret and BeGambleAware, with some signs of increase in specific Tap Out behaviours

Figure 5.2 provides a summary assessment of the performance of the Bet Regret Campaign against the theory established in the behaviour change model at Figure 5.1, drawing on the learning from waves 1-8 of the tracking research. At Figure 5.2, green indicates areas of significant impact, orange indicates some or varied impact, and grey indicates areas of no impact.

Overall, the campaign achieved strong recognition among key target groups, helping raise awareness of risky betting, and establish the concepts of Bet Regret and Tap Out. The campaign was seen to be engaging, motivational and most relevant to target groups, with a clear increase in awareness of BeGambleAware.

Tracking data showed that the campaign had little room to improve claimed knowledge. Awareness of the signs of risky betting and knowledge of how to cut down were consistently high from early waves of research, suggesting that these outcomes should not be the focus of the creative execution.

Latter iterations of the campaign showed significant progress in the proportion actively tapping out or pausing before placing a bet as a means of reducing risky betting – indicating that the campaign had successfully raised awareness of this call to action. However overall, progress in the proportion thinking about or actively cutting down was inconsistent across all waves of tracking, with little growth over time. In some cases, the impact of the campaign has been significantly compromised by the COVID-19 pandemic, where the opportunities and circumstances for betting varied greatly – for example the suspension of football matches, or increased opportunities to bet whilst bored.

These findings are explored in more detail in sections 5.3, 5.4 and 5.5 below.

Figure 5.1: Behaviour Change Model Overview

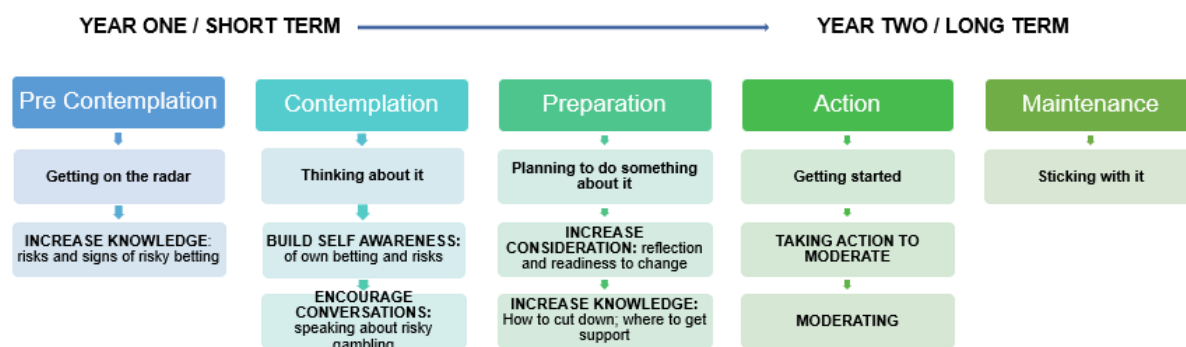
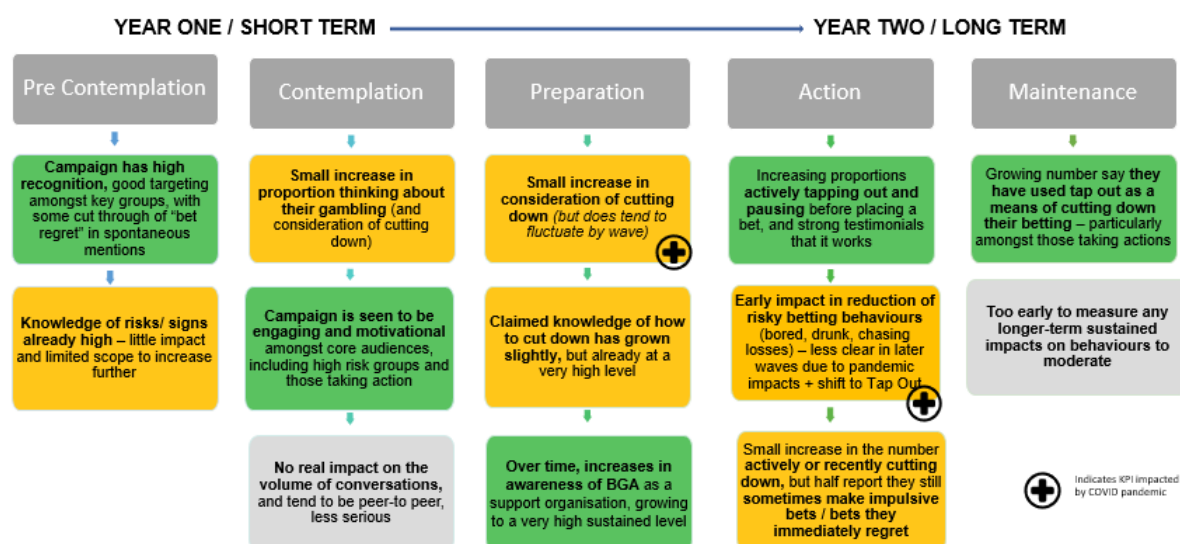


Figure 5.2: Behaviour Change Model Evaluation



Source: Ipsos MORI Tracking Research

5.3 Exposure to the campaign

5.3.1 The tracking research helped validate the campaign media strategy - recognition was high and well-targeted

The second half of each survey asked respondents whether they had seen or heard of the Bet Regret Campaign. As shown in Figure 5.3 below, recognition was consistently higher among target groups for the campaign. More than three-quarters (77%) of those exhibiting risky betting behaviours ('High Risk') had seen the campaign at waves 2, 4 and 7; three times as many as those who did not gamble (Non-Gambling audience).

The tracking research also provided some points of comparison to other campaigns. Ipsos MORI's campaign norms database suggested that campaign recognition was broadly in line with other national TV

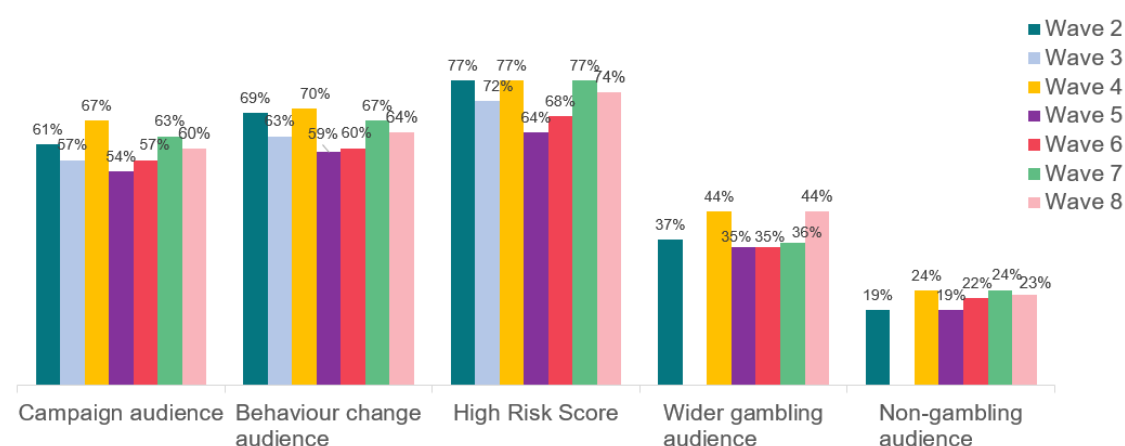
led campaigns in the public sector, and was performing better than the 'When The Fun Stops Stop' campaign.¹⁵

As expected, the decay in recognition scores aligned with bursts of high-profile media activity; however, campaign recognition remained relatively high among key groups during periods of lower campaign activity. This suggests that both that the 'always on' social media content added significant value, and that the campaign overall was memorable.

Further research commissioned in November 2019 also verified the value of the Bet Regret campaign's relationship with David James. More than half of the campaign audience (53%) reported having seen an advert featuring David James; most recognised him (69%); and an overwhelming majority (79%) thought that it was a good idea for the campaign to feature him as an ambassador. This research allowed for fast decision making and the immediate continuance of this strand of activity (without waiting for the next standard tracking).

Figure 5.3: Campaign recognition – prompted (waves 1-8)

Campaign recognition by audience - % recogniser



*Comparisons between waves should be treated with caution, as ad prompts necessarily changed to reflect the change in executions of the campaign.

Base sizes: Campaign Audience (600), (Behaviour Change Audience (385), High Risk (252) Wider Gambling (522) Non-Gambler Audience (478)

Source: Ipsos MORI online survey

Outcome:

Metrics relating to campaign recognition confirmed that the campaign had an efficient media strategy with spend targeted in the right areas to maximise exposure among key groups of interest. It also validated the importance of the social media content and the use of David James as an ambassador to the campaign – a role that he has continued through further iterations of the campaign.

5.3.2 The tracking research also showed the campaign to have significant cut through despite a relatively small share of voice against other gambling ads

As part of the measurement of campaign exposure, the tracking research also asked for recognition of relevant advertising that promoted safer gambling messages without showing the Bet Regret Campaign

¹⁵ Comparing results for wave 4 with similar metrics for 'When the Fun Stops Stop' campaign at nine months in – WTFSS 'recognition' was 56% amongst regular gamblers, and 36% amongst all adults.

assets – this was known as ‘unprompted recognition’. As expected, fewer individuals were able to cite examples of adverts they had seen encouraging people to think about their gambling and avoid making bets they might regret before they were shown visual examples of the campaign.

The tracking data showed that the proportion who had seen or heard relevant adverts increased over waves 5-8; moreover, respondents were more likely to recall key elements of the Bet Regret campaign than they were able to at wave 4 (such as reference to BeGambleAware 10%, ‘Tap Out’ 6% or ‘BetRegret’ 3% at Wave 8). The tracking data also highlighted the challenge the Bet Regret campaign faces in standing out as ‘top of mind’ against other high profile safer gambling messages such as ‘When The Fun Stop Stops’ – this was cited by 14% of people who had seen relevant advertising at wave 4.

As noted in the narrative report of the campaign¹⁶, total spend of the Bet Regret campaign represents a 2.8% share of voice of total sports betting spend. In this context, the Bet Regret campaign has secured a high level of awareness and engagement relative to the level of campaign spend.

Outcome:

Tracking of ‘unprompted recognition’ helped place the Bet Regret campaign and associated spend in the context of other safer gambling messages. The salience of the language of Bet Regret within this measure will continue to help the campaign evaluate whether it has been successful in being at the forefront of bettor’s minds.

5.4 Performance of the campaign

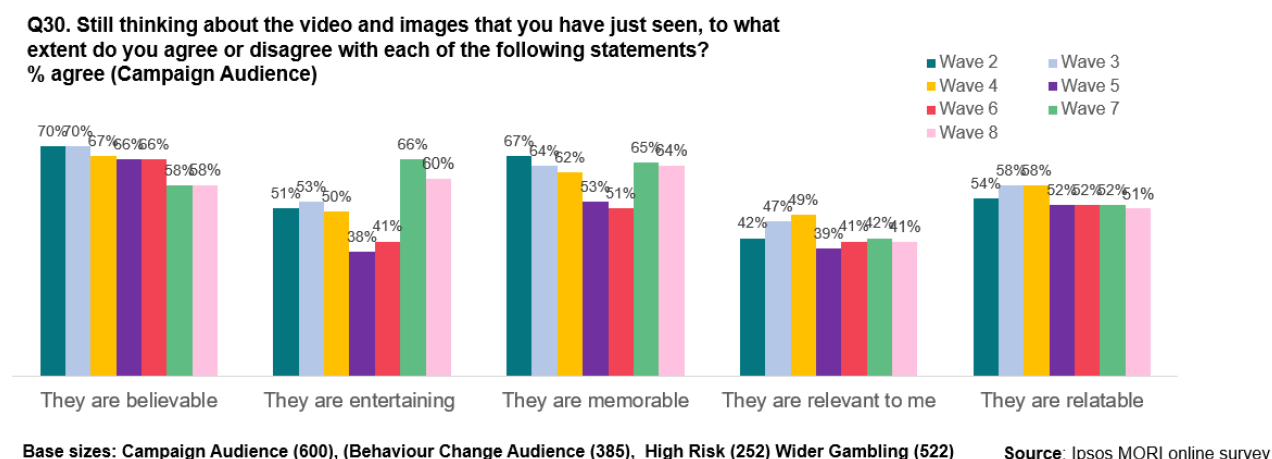
5.4.1 The campaign was well received and viewed as memorable, entertaining and engaging

The tracking research complemented earlier creative development qualitative research by providing quantitative feedback on how bettors reacted to campaign content.

Overall, the results validated earlier research in confirming that bettors found the content memorable, entertaining and engaging. Despite the humour and fictitious nature of the campaign, viewers understood the universal emotions experienced by the characters – most found the content believable and relatable. The tracking research also showed that the second iteration of the campaign, and launch of Tap Out for Timeout, delivered further impetus – the scores for being ‘entertaining’ and ‘memorable’ increased significantly between waves 6 and 7 (from 41% to 66% and from 51% to 65% respectively), and remained stable at wave 8 (60% thought the ads were entertaining, and 64% thought they were memorable).

¹⁶ <https://www.begambleaware.org/for-professionals/safer-gambling-campaign>

Figure 5.4: Campaign Diagnostics



5.4.2 The campaign was most relevant among those who were taking or thinking about taking action to reduce their betting

The earlier YouGov segmentation had identified that only 22% of young male bettors exhibited risky behaviour – suggesting that the campaign would not be relevant to all bettors in this demographic. Further analysis was undertaken in wave 8 of the tracking research to assess the extent to which the campaign was effective at reaching its target audience. At wave 8, 41% of the Campaign Audience said the campaign was relevant to them personally, which rises significantly to 58% of High Risk gamblers (a significant increase of +9ppts from wave 7). This data provides positive signs that latter amends to the campaign execution were successful in increasing the relevance among target groups.

By cross-referencing risky behaviours with current action taken to moderate gambling behaviour, the tracking research showed that around half of the Campaign Audience (51%) exhibited some risky betting behaviours but were either taking action or intend to in the future (figured 5.3). As shown in Figure 5.4, further investigation confirmed that the campaign resonated most strongly with who are most likely to benefit from a call to action (those currently or intending to cut down), and less strongly with those who are still taking risks but who aren't contemplating taking action.

Figure 5.5: Betting profile of campaign audience

Current betting profile

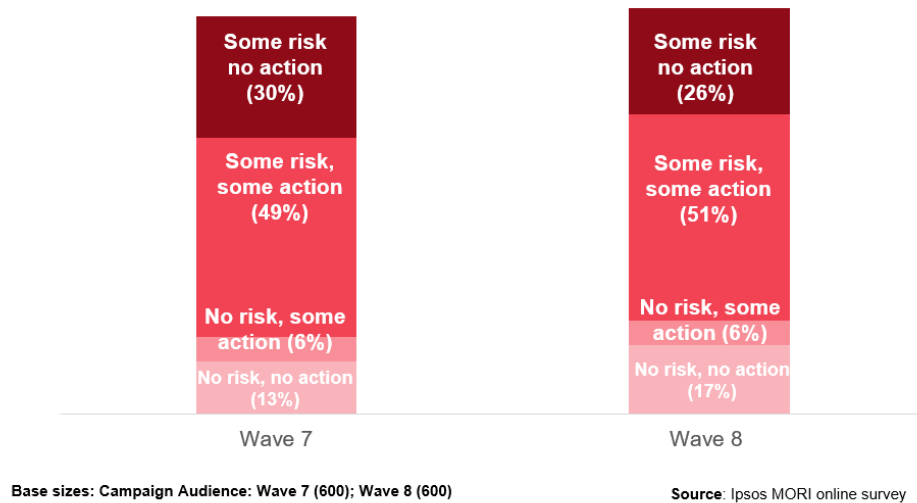
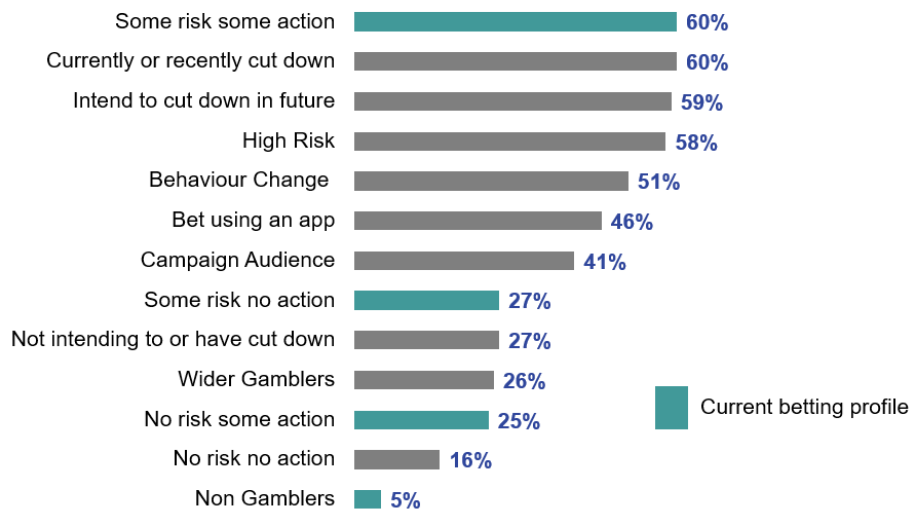


Figure 5.6: Relevance of the campaign by betting profile

Q30. Still thinking about the video and images that you have just seen, to what extent do you agree or disagree with each of the following statements? % agree they are *relevant to me*



Base sizes: Campaign Audience (600), Behaviour Change Audience (385), High Risk (252) Wider Gambling (522) Non-Gambler Audience (478)

Source: Ipsos MORI online survey

Outcome:

The tracking research helped confirm that the campaign message resonated most strongly with the target audience, and helped validate the amends made after wave 7 to increase the relevance among key target groups. The research also provided valuable context for reviewing shifts in betting behaviours: the campaign message could not expect to drive significant shifts in attitudes among low risk bettors, or those exhibiting risky behaviours but who do not believe they need to moderate their betting.

5.4.3 The key messages of the campaign were clear and well understood, with notion of Bet Regret and Think Twice ever-present within evolution of the campaign

The tracking research also provided an opportunity to test whether the campaign assets performed well at delivering key campaign messages. The survey used a mixture of unprompted and prompted questions to test understanding of the campaign, including asking respondents to fill in thought bubbles to explain in their own words how key characters could be feeling.

The successful delivery of key messages was evident throughout:

- At wave 2, when asked to fill in the thought bubble, respondents were overwhelmingly most likely to use phrases which elicit immediate bet regret; such as: 'Should I...', 'Why did I...', 'I shouldn't have...', 'I wish I hadn't...', 'I'm an [idiot]...', 'Is it worth...' 'Oh no...', 'Oh dear...', 'What am I doing...', 'What have I done...'.
- At wave 4, the proportion of respondents identifying the notion of 'Think Twice' was increasing – matching its integration within the campaign
- At wave 8, the data validated the evolution of the campaign. The notion of 'Tap Out' was selected by over half of respondents (53% selecting at least one statements relating to 'Tap Out' behaviour), but not at the expense of other broader concepts of thinking twice or avoiding bet regret.

5.4.4 The campaign was most likely to inspire action among target groups, including traction on notion of Tap Out

The tracking research also explored the likely actions and impact inspired by the campaign. At wave 8, nearly three in four (73%) agreed with four or more core campaign statements. Around half of the campaign audience reported that it made them less likely to place bets they would immediately regret (50% at wave 8) or made them think about the types of bets they do (49%). As the campaign evolved, a similar proportion were also inspired to try Tap Out or talk to others about it. Only 10% were not inspired to take any action – which was most likely to be amongst those not undertaking risky betting.

Across all these measures, the positive impact reported by respondents was greatest among higher risk bettors. This was particularly the case for encouraging individuals to use the language of the campaign in discussion with peers, or in giving Tap Out a go.

Figure 5.7: Likely impact of the campaign

Q30 Thinking about the video and images you have just seen, which of the following, if any, do you think the key messages they are trying to get across are?

Campaign message	% of the campaign audience who agree with each statement	Difference from Wave 2	Difference from Wave 7
Made me see the benefits of tapping out	64	n/a	n/a
Made me less likely to place bets I will immediately regret	50	-4	-1
Made me think about the types of bets I do	49	-4	-2
Made me want to close or tap out	50	n/a*	+11
Made me want to talk to others about idea of tapping out	43	n/a	+4
Encouraged me to bet less	49	+0	+7
Made me want to use the words 'Bet Regret'	40	n/a*	+5

Base sizes: Campaign Audience, Wave 8 (600) *not asked in wave 2

Source: Ipsos MORI online survey

5.5 Impact of the campaign

5.5.1 Awareness of BeGambleAware increased over the course of the campaign

One of the aims of the campaign was to increase awareness of BeGambleAware as a service that could be used to support those looking for help to moderate their betting behaviours. Over the first 9 months of the campaign the proportion who had heard of BeGambleAware increased from 81% to 92% - a level then sustained throughout waves 3 -8.

When asked specifically which support services they have recently used or may use in the future, the tracking research also identified positive shifts in likelihood to draw on BeGambleAware services. For example, those in the Campaign Audience who would use the helpline in future rose from 27%-31% across the 7 waves of research; and from 23% -32% among those identified as higher risk. Similarly, the proportion of high-risk respondents who had recently cut down contacting the helpline rose from 19%-25%.

More broadly, fewer of those identified as higher risk said they would look to reduce gambling alone off the back of their own efforts (from 26% at baseline wave 1 to 18% at wave 8).

Outcome:

The tracking research suggested that the campaign had a positive effective on the brand of BeGambleAware, helping raise awareness not just among bettors, but also among non-gambling audiences.

5.5.2 The campaign had less impact on levels of self-awareness of key risks and knowledge of how to cut down, which were already high

The logic model developed for the campaign (see Figure 5.1 above) identified two early goals for the campaign: i) increase knowledge or risky betting behaviours (pre-contemplation); ii) build self-awareness and encourage conversations (contemplation). Both were viewed as pre-cursors to moderating betting behaviour.

Early waves of the tracking research showed high levels of claimed knowledge and self-awareness among the Campaign Audience. As shown in Figure 5.8, these metrics remained broadly consistent throughout the campaign.

By wave 4, the lack of movement in metrics of self-awareness and knowledge prompted a test at wave 5 to check the accuracy of self-reported measures. In Wave 5, the survey asked an open-ended question to test whether respondents could identify the signs of betting too much. The vast majority of those claiming knowledge identified at least one valid sign. Most identified betting beyond their means and chasing losses as key signals for betting too much; however, it was less common for respondents to cite softer emotional signals such as being stressed and irritable.

Figure 5.8: Knowledge of how and when to cut down

Q7/Q8. To what extent do you agree or disagree with the following statements?

%agree



Base sizes: Campaign Audience (600), Behaviour Change Audience (386)

Source: Ipsos MORI online survey

Outcome:

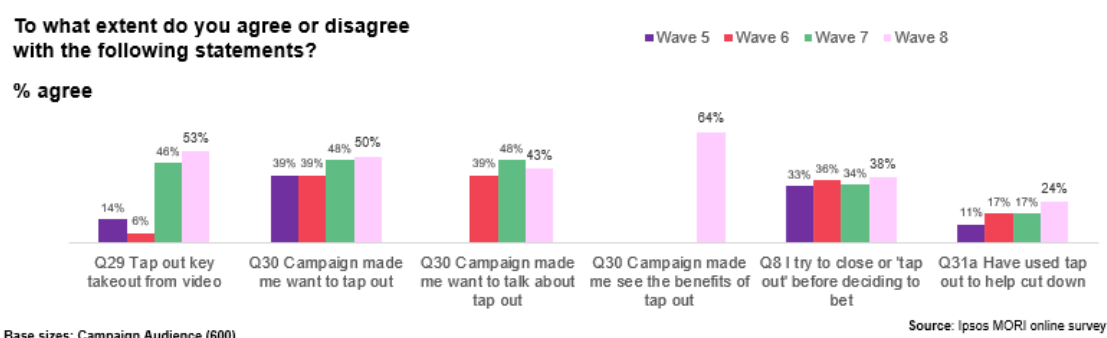
By wave 5, the tracking research provided reassurance that the campaign should not focus on increasing knowledge and building self-awareness, and instead focus on supporting those ready to take action to moderate their betting.

5.5.3 The campaign was successful in raising consideration of 'Tap Out' and pausing to take a moment before placing a bet

As the campaign evolved, creative executions moved from raising awareness of moments of Bet Regret to raising awareness of how to take action through tapping out and pausing to take a moment before placing a bet. As noted in chapter 3, this call to action had been validated through exploratory research, and tested as part of creative development.

The final wave of tracking research identified significant increases in both awareness off and use of tapping out as a means to reduce risky betting behaviours. For example, the proportion saying they Tap Out increased from 33%-38% from Waves 5-8, and the proportion who said the campaign made them want to

Tap Out increased from 39%-50% among the Campaign Audience. The progress made from Wave 5 was most apparent among key target groups, especially those identified as still taking some risks but contemplating or taking action to moderate their behaviour.



Outcome:

The tracking data helped evaluate the Tap Out behaviour and call to action, demonstrating both that it was relevant and accessible to target groups, and that the execution of the campaign had been successful in building momentum. This provides a strong foundation for future campaign evaluation to establish whether these behaviours have been maintained.

5.5.4 Ability to assess the impact of the campaign on betting behaviour was complicated by the coronavirus pandemic

A longer-term aim for the second year of the Bet Regret was to increase the numbers of risky sports bettors taking steps to cut down their gambling. The tracking research helped assess progress against this goal in the context of the coronavirus pandemic in 2019-20.

Tracking data showed that the dynamics of betting had changed during the pandemic. The first national lockdown in Spring 2019 presented fewer opportunities to bet on English football; furthermore, betting whilst bored and on sports people know little about had risen (from 33% in wave 4 to 43% in wave 5; and from 12% to 19%). Betting whilst bored also spiked during the second national lockdown in October/November 2019.

Data from wave 5 also showed that high-risk bettors were more likely to have changed their gambling behaviour during the pandemic – 24% said they were betting more (compared to 12% of the Campaign Audience overall), and 16% said they had shifted to other forms of gambling (compared to 10% overall).

It is therefore impossible to separate the impact of the campaign on betting behaviour from impact of the coronavirus pandemic. For example, the act of cutting down betting may be as a result of reduced opportunities to bet, as suggested by a high of 45% of the campaign audience saying they have recently cut down at wave 5 of the tracking study (see Figure 5.7 below) which was conducted during the first national lockdown.

Outcome:

The tracking data demonstrated clearly that the goalposts had changed, and that shifts in betting behaviours were also impacted by external events outside of the control of the campaign. It also demonstrated the value of ensuring that the scenarios of bet regret portrayed in the campaign remained relevant to current circumstances.

5.5.5 Impact on proportion considering or taking action has been limited to date; overall, target audiences were no more likely to report that they had completely cut out moments of BetRegret

After 4 waves of tracking research, and prior to the coronavirus pandemic, the data provided an indication that the risky behaviours highlighted in the Bet Regret campaign had started to fall. This included decreases in numbers reporting they bet on sports they don't know much about (12% wave 4 vs 23% wave 3); betting whilst drunk (17% vs 20%); betting soon after they have lost (17% vs 20%); and betting because bored (33% vs 37%).

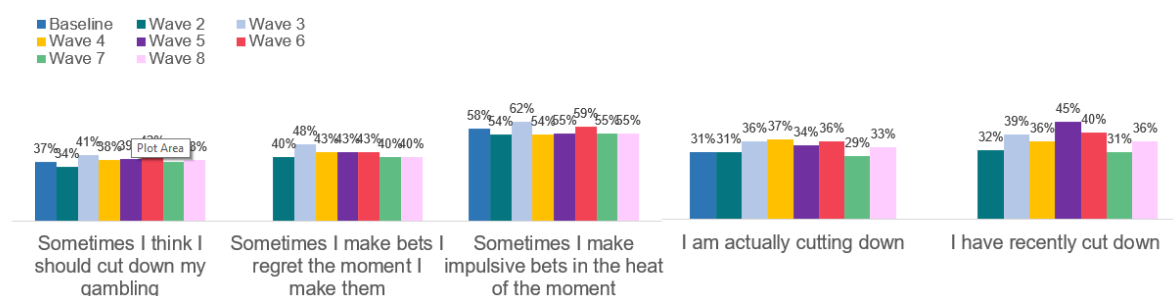
The tracking data showed that overall, after 8 waves of research, the proportion of young male gamblers acknowledging moments of bet regret is broadly in line with the start of the campaign. Equally, the number of the Campaign Audience thinking about or actively cutting down has not increased substantially.

Though these findings should be treated with caution due to the impact of the coronavirus pandemic, they have provided valuable impetus to continue to review and improve the execution of the campaign to encourage greater behaviour change.

Figure 5.9: Overview of bet regret and action to cut down over time

Q7/Q8. To what extent do you agree or disagree with the following statements?

%agree



Base sizes: Campaign Audience (600), (Behaviour Change Audience (386), High risk (252)

Source: Ipsos MORI online survey

Outcome:

As a result, additional research and development of the campaign was commissioned in late 2020 to try and further encourage behaviour change and maximise the impact on the Campaign Audience. This led to increase in proportion considering or actively Tapping Out between waves 7-8.

6 Learnings and conclusions

This chapter provides an assessment of the role of research in supporting the development of the Bet Regret campaign, highlighting both what worked well, and opportunities for improvement. Please note, the key learnings presented here represents the views of Ipsos MORI, and do not necessarily represent the views of the Safer Gambling Board or all the authors who contributed to each research study.

6.1 Conclusion

Overall, it's clear that the Safer Gambling Board has taken an evidence-based approach to the development of the Bet Regret campaign. The commitment to make decisions based on latest available evidence is witnessed by the scale of investment in research – to date equivalent to almost 10% of media expenditure.

Research was used throughout the lifecycle of the campaign to:

1. inform the overall strategy and aims for the campaign;
2. inform the initial creative brief;
3. provide feedback on which concepts and executions had the most desired effect;
4. monitor exposure to the campaign and evaluate the media strategy; and
5. evaluate the impact of the campaign and identify potential improvements.

The commissioning of research has been both proactive and agile – anticipating the need for fresh insight whilst also adapting well to the changing circumstances presented by the coronavirus pandemic. Perhaps most importantly, the campaign has acted on the insight provided by the research, adapting and evolving in line with the evidence presented in order to maximise the potential impact of the campaign.

6.2 Strengths

1. **Flexibility and agility:** it is not unusual for campaign research to be highly structured, reporting at regular intervals to track change over time. The Bet Regret campaign benefitted from a more agile approach to research, either delaying or quickly commissioning fresh insight to make best use of research budget and to ensure the findings were relevant and timely. For example, this is evident in commissioning of additional research by Outsiders to explore the impact of changes that had to be made to the campaign as a result of the coronavirus pandemic; in the use of research to sense-check creative assets immediately before launch; and in the agile timing of the tracking research which was conducted immediately before and after campaign bursts to maximise the chance of identifying real change caused by the campaign. All research was commissioned and funded by GambleAware, with the approval of the Safer Gambling Board, and close involvement of the communications agency. There was a common understanding that agility was important, with short lines of communication and decision makers committed to responding quickly in terms of signing off research proposals.
2. **Creativity:** The campaign sought creative ideas to help tackle important research questions. For example, using mobile app diaries and self-ethnography to record the performance of early behavioural nudge concepts; and in asking respondents to complete 'thought bubbles' during the tracking research to check the delivery of key messages and emotions. The research also sought to test the assumptions presented in the tracking research, for example testing knowledge of risky

betting behaviours, and triangulating understanding through a mixture of unprompted and prompted questions.

3. **Follow-up research:** As part of the tracking research, additional permission was sought to recontact respondents for further research. The campaign has used these opportunities to good effect, firstly as the sample for the Behavioural Trial in November 2019, and most recently for qualitative depth interviews to better understand how to improve Tap Out messaging after wave 7. Developing a re-contact sample had two main benefits: i) it reduced the time taken to set-up and recruit allowing for quick return of data; and ii) presented the research team with extensive contextual data on respondents' recent betting attitudes and behaviours.

6.3 Opportunities

1. **Defining the target audience for research:** a key challenge for the campaign was that the target audience was not-static, indeed a key aim was to encourage bettors to move from *contemplation*, through to *preparation* and *action* to moderate their betting. As such the tracking research could not use the segmentations created by YouGov to help track the impact of the campaign. Work undertaken to cross-reference risky betting behaviour with willingness to take action at wave 7 could have been monitored earlier, and potentially used to help define the target audience. This would have provided a more accurate reading of campaign audience from an earlier date.
2. **More secondary behavioural data:** a key challenge for the primary research conducted for the campaign was the reliance on self-reported behavioural data, and the lack of detailed context surrounding each individual respondent. The most valuable data source would be operator transaction data to help measure whether betting behaviours had changed – which could identify betting volumes and frequencies, and signs in reduction of risky bets. Such data was sought, but not made available to the campaign team. However, this would still not have captured emotional or all situational aspects of gambling – such as betting whilst bored, or identifying moments of bet regret. A further opportunity for future studies would be to establish a panel as part of a tracking study. This would likely still rely on self-reported data, but would provide more datapoints per individual and an accurate longitudinal perspective on what might have changed, why, and when. Any panel would focus purely on behaviours; research to assess exposure to the campaign would still need to be conducted separately.¹⁷
3. **Sample size:** the Bet Regret campaign was so successful at targeting higher risk gamblers that it was difficult for the tracking research to attribute any changes in attitudes and behaviours to exposure to the campaign; instead differences were more likely due to underlying differences in the profile of high vs low risk bettors.¹⁸ A larger sample of higher-risk bettors would have increased the chance of being able to identify real change attributed to the campaign; however, this would be difficult to achieve at the point of recruitment, require careful consideration of an appropriate weighting scheme, and add significant cost.
4. **Adding more depth to tracking research:** additional value would have been gained from asking more follow-up questions within the tracking study to those who did not respond positively– for example asking all those who said the assets were not relevant to them, why this was the case. This could also be useful for those who have not or would not consider Tapping Out.

¹⁷ Furthermore, if the panel tracking had been established at the start of the campaign, it would have been possible to identify an individual's original segment (as per YouGov attributes) and thus track impact and change within segments.

¹⁸ For example, it is common to compare the profile of those who have 'recognised' the campaign with those who have not. Comparing any differences between these subgroups and the baseline scores helps attribute the importance of exposure to the campaign

5. **Refinement and reduction in the number of key performance indicators over time:** A key trade off when tracking the performance of a public health campaign is maintaining trends vs refining measures. Whilst the study was effective at adding measures to account for new aspects of the campaign (for example notion of Tap Out), additional changes would help add clarity to the performance review and potentially help demonstrate impact where measures are too open to interpretation.¹⁹

¹⁹ For example, the frequency of bet regret is too open within the statement 'sometimes I make bets I regret' – someone reducing a *large amount* of bet regret to a *little amount* may still give the same answer 'sometimes'. Furthermore, some statements could be made mutually exclusive to avoid paradoxes in the data – for example whether bettors have *recently*, *are doing*, or *intend* to cut down.



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